GETTING STARTED USER GUIDE

DOCUMENT MANAGEMENT

INEIGHT

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CONTENTS

CHAPTER 1 – SETTING UP INEIGHT DOCUMENT

For information on how to set up InEight Document, see the links below.

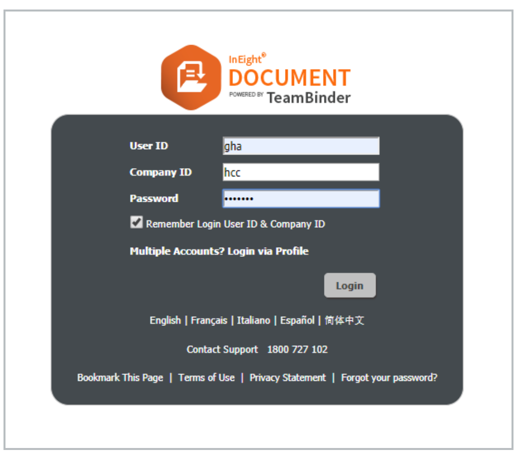
1.1 LAUNCHING INEIGHT DOCUMENT

Launching InEight Document requires the Google Chrome browser. Although Document might work on other browsers such as Internet Explorer 11.0, Microsoft Edge, Mozilla, and Safari 9.0, Document has not been tested extensively with them, and you could experience issues.

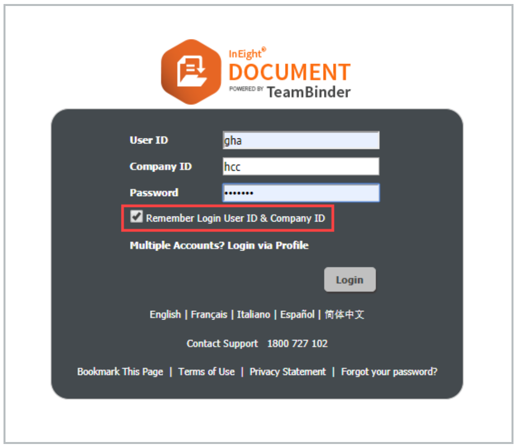
After your account has been created, you will receive a welcome email with your log in details.

1.1.1 To launch InEight Document:

1. Open your internet browser.
2. In the address bar, type in www.teambinder.com or the URL you've been given for your project. For example, your URL might be us.teambinder.com.
3. If your project is enabled for multiple languages, select your preferred language.
4. Enter your user ID, company ID and password.



5. If you want the website to remember your login information, select the check box.



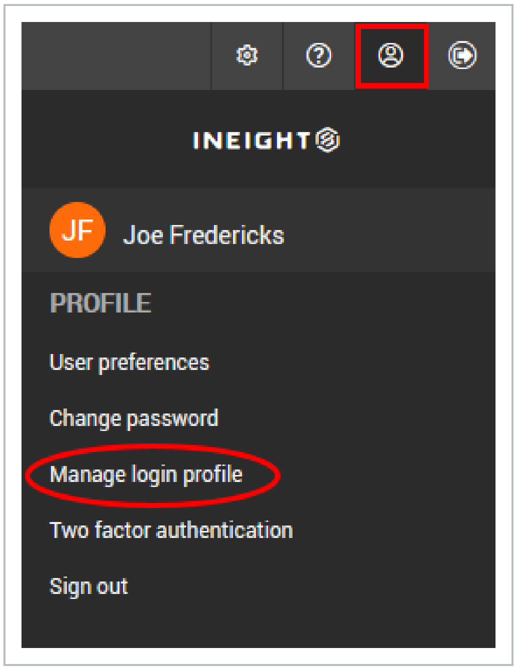
6. Click **Login** and select the project you want to log into.
7. If you have access to multiple projects, use the column filters at the top of the column headings to find your project.
8. If a project disclaimer message appears, click **Agree** to load the Document Dashboard.

1.2 SETTING UP YOUR LOGIN PROFILE

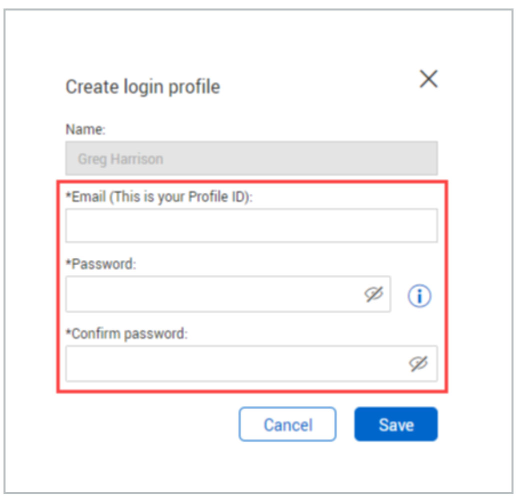
If you are working on multiple projects, you might have more than one set of login credentials. The login profile feature combines all your credentials under a single profile account. This lets you log into all your projects with one email address and password.

1.2.1 To set up your login profile:

1. Click the **profile icon** and select **Manage login profile**.

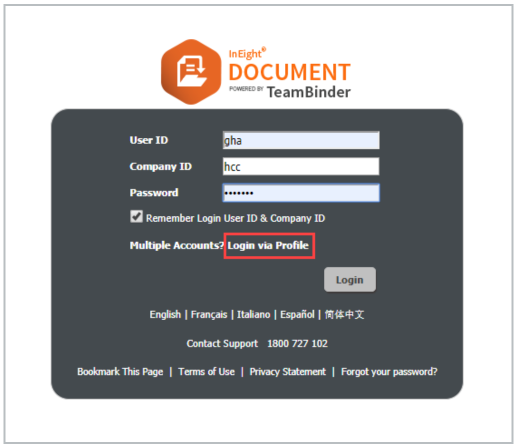


2. Enter your email address and password.



3. Click **Save** and enter in the project credentials to add projects to your profile.

4. Next time you log in, click **Login via Profile**.



NOTE

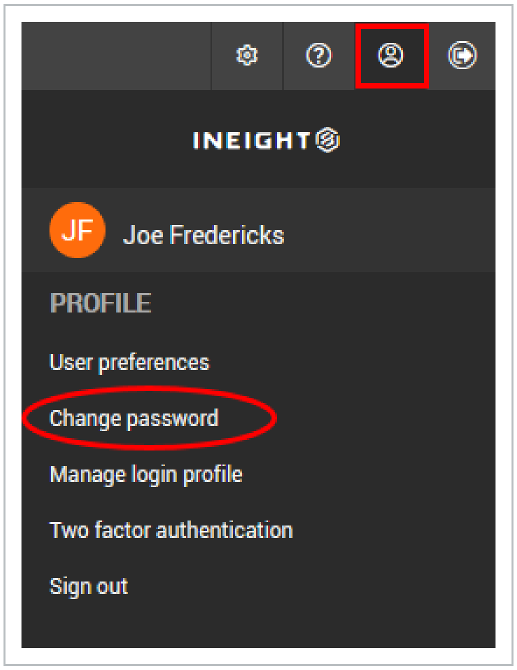
- If you have multiple user accounts on a single project, you will only be able to link one of them to your profile account.
- If you need to change your profile ID in the future, the change must be requested through the support team at support@ineight.com.
- You can use two-factor authentication with a login profile if single sign-on is not enabled for the company.

1.3 CHANGING YOUR PASSWORD

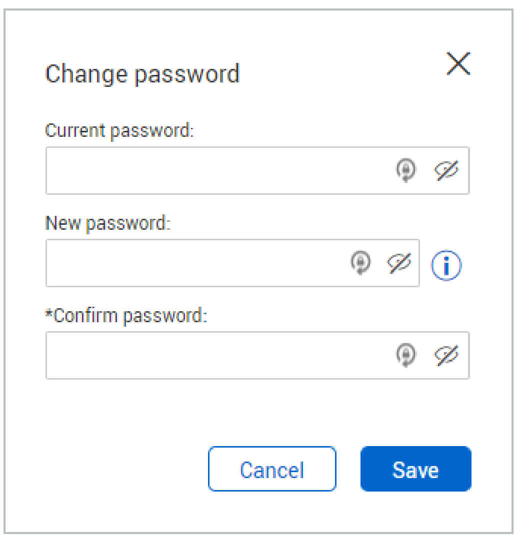
You can change the password that you use to log into InEight Document. The expiration for passwords is 183 days.

1.3 Step by Step 1 — Change your password

1. Click the **profile icon** and select **Change password**.



2. Enter your current password and your new password.



3. Click **Save**.

1.3.1 Changing passwords across multiple projects

Where multiple projects are being accessed by a user with a standard InEight Document login, all projects are accessed using the same UserID, CompanyID and Password. Alternatively, you can use a Login Profile which consolidates your credentials under a single profile account. For more information on using Login Profiles, see this article.

If a user's password changes for one project, this may result in a project 'disappearing' from the user's project list.

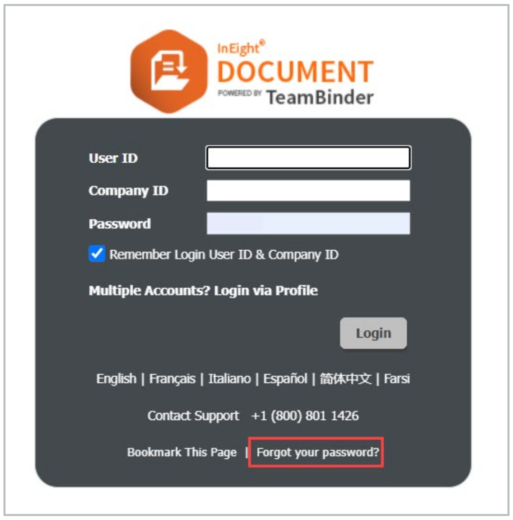
The affected user would need to log in with their new password and manually re-configure it to match the password of the other projects. At this point their project list should be fully available once again.

NOTE

- If a Project Administrator manually resets a user's password for one project and that Project Administrator is unique only to that project for that users project list, then this will change that user's password for only that project.
- If this is done whilst a user is logged in and that user originally had access to 5 projects, they may notice that with the sudden change of password, that their project list has been reduced by 1 project, due to the change in password.
- In this scenario, the user whose password was changed should also receive a 'Notification of Password Change'.
- If a user has their 'Welcome to InEight Document' Notification re-issued for one of their projects this will also trigger a password reset as the users existing password is not sent out as part of the notification, to prevent unauthorized access to other projects the user may have access to.

1.3.2 Forgot password

If you forgot your password, click **Forgot your password** at the bottom of the Sign in dialog box.



The Request New Password dialog box opens. Enter your user ID, company, and email address, and then select the reCAPTCHA checkbox. Click **OK**. Password information is sent to you in an email message.

1.4 ENABLE TWO FACTOR AUTHENTICATION

Two factor authentication can be enabled for user logins and login profiles via the Google or Microsoft Authenticator apps.

1.4 Step by Step 1 — Enable two factor authentication

Summary: Enable two factor authentication when you want an extra layer of security when signing in to Document.

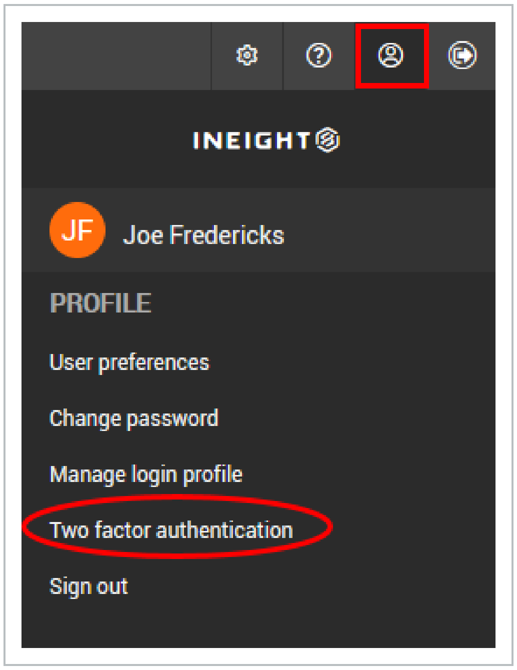
Considerations: When single sign-on is enabled for a company, the two-factor authentication requirement is disabled for users from that company.

If you enable two factor authentication, you must enter your standard credentials and the code provided by the Microsoft or Google Authenticator app.

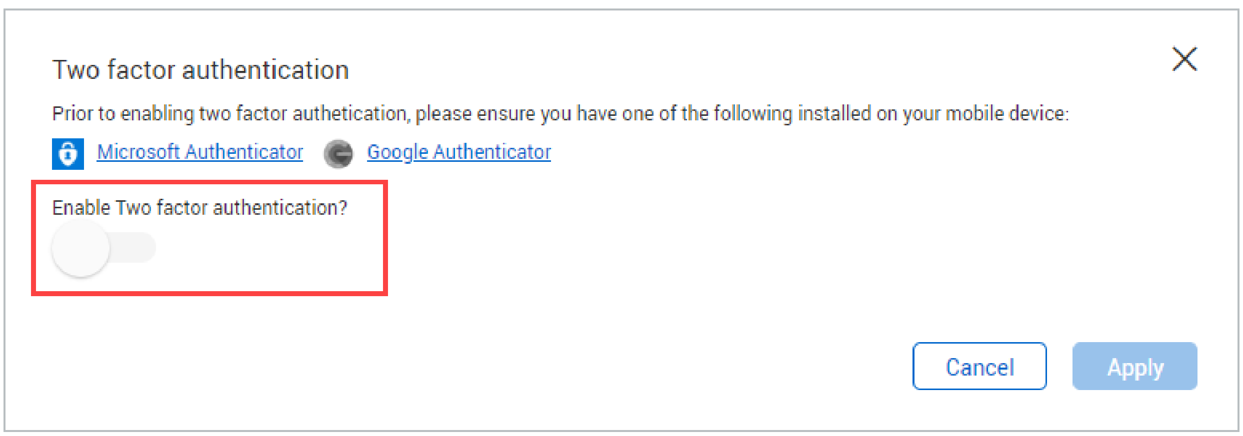
Before you enable two factor authentication, make sure you have downloaded the Microsoft Authenticator or Google Authenticator app on your phone.

Quick steps:

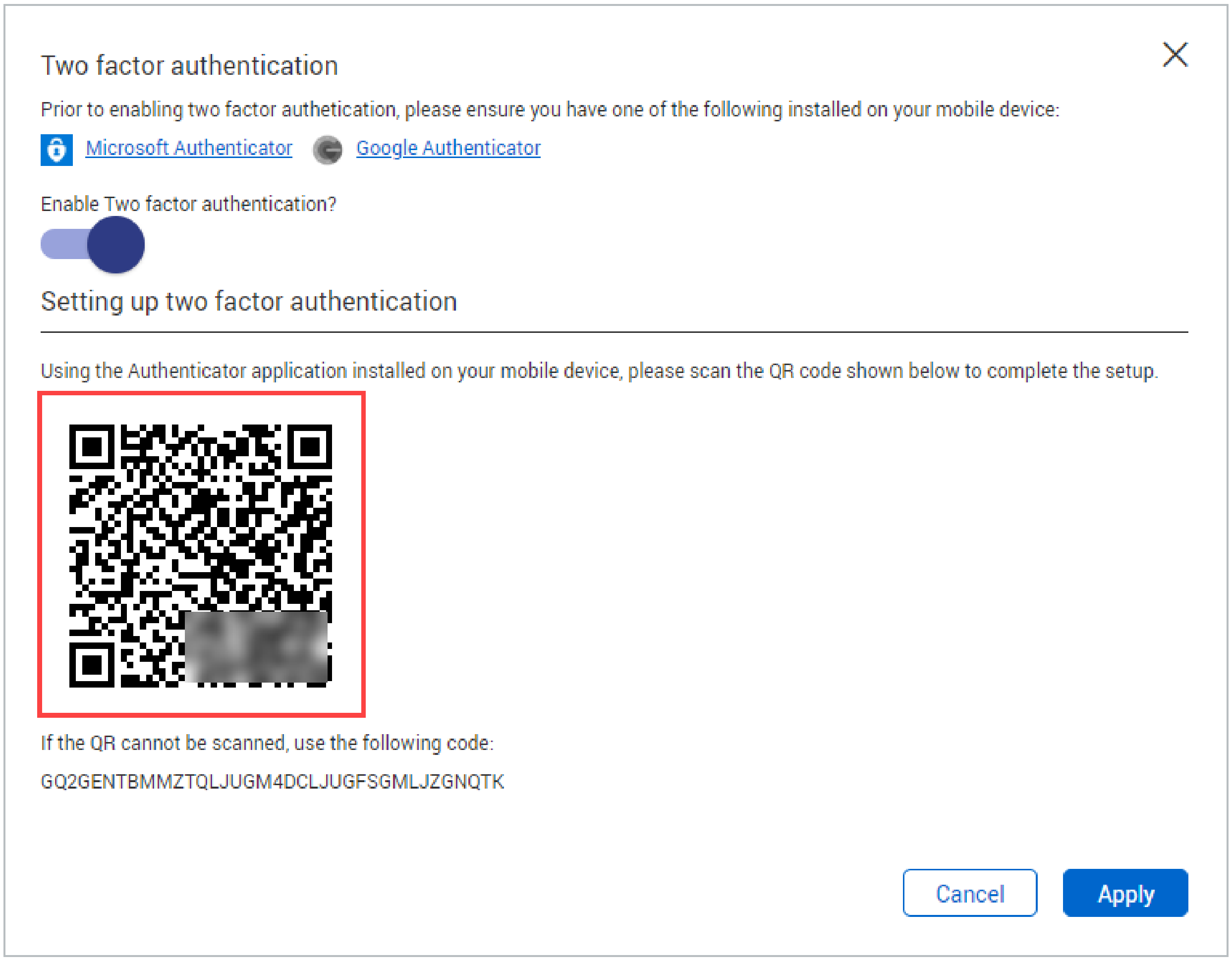
1. Click the **profile** icon and select **Two factor authentication**.



2. Click the toggle button to enable two factor authentication.



3. Scan the QR code with the Authenticator app on your phone.



4. Click **Apply**.

1.5 CONNECT TO SINGLE SIGN-ON

Single sign-on is configured at a Company level by people that have access to add and edit Company details. Single sign-on allows users to log into and access InEight Document with the same credentials as those used when logging into their computer or organization network.

1.5 Step by Step 1 — Connect to single sign-on

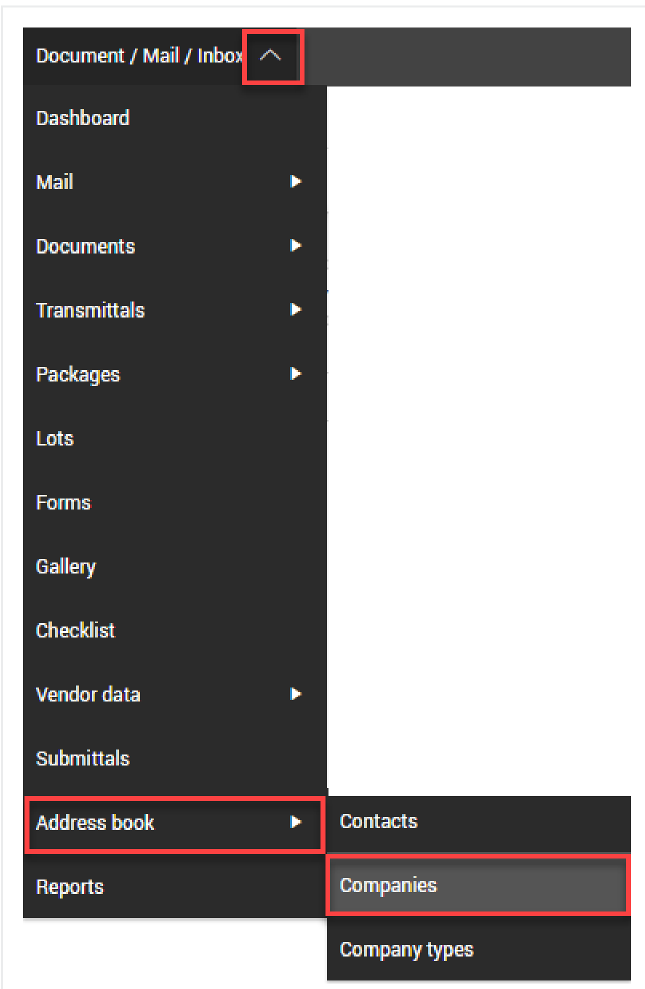
Summary: Connect to single sign-on to let Document users sign on with the same credential as their computers or organization network.

Considerations: When single sign-on is enabled for a company, the two-factor authentication requirement is disabled for users from that company, whether enforced or opt-in.

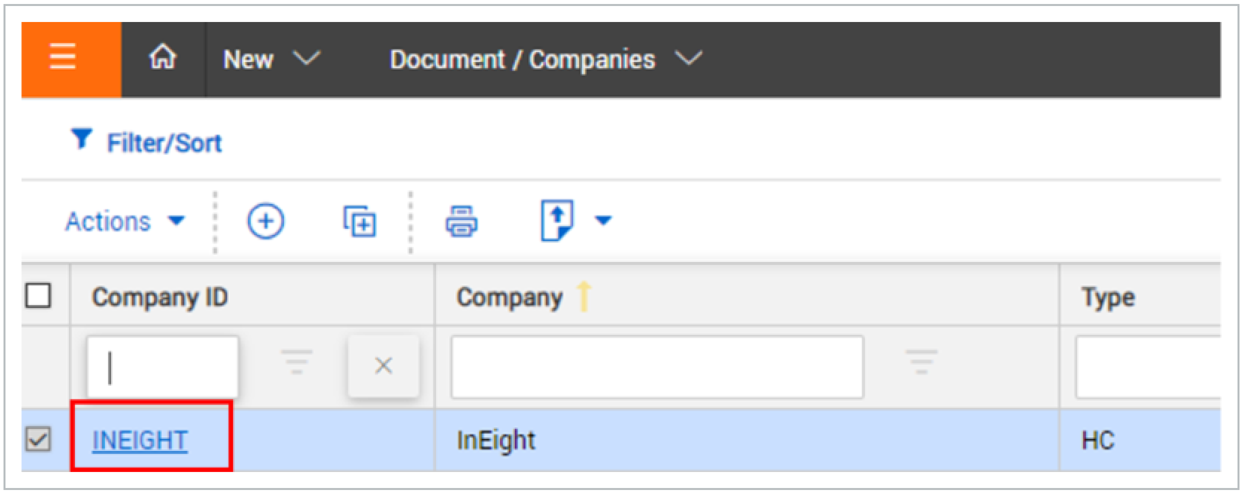
The instructions below are for Azure set up only. For other authentication provider set up, contact the InEight support team.

Quick steps:

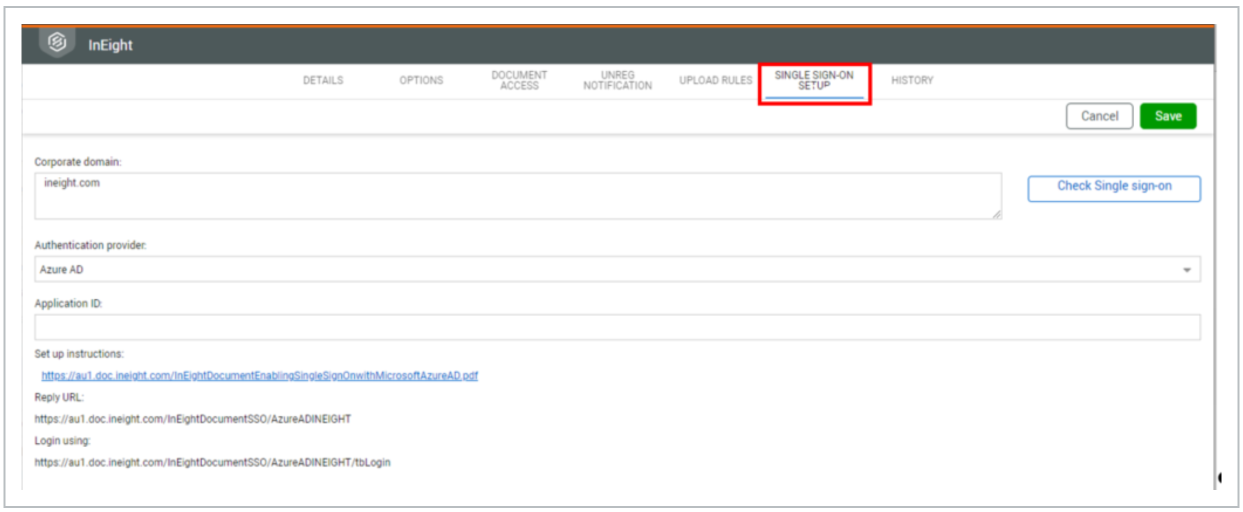
1. Go to **Companies**.



2. Click the blue underlined **Company ID** to open the company.

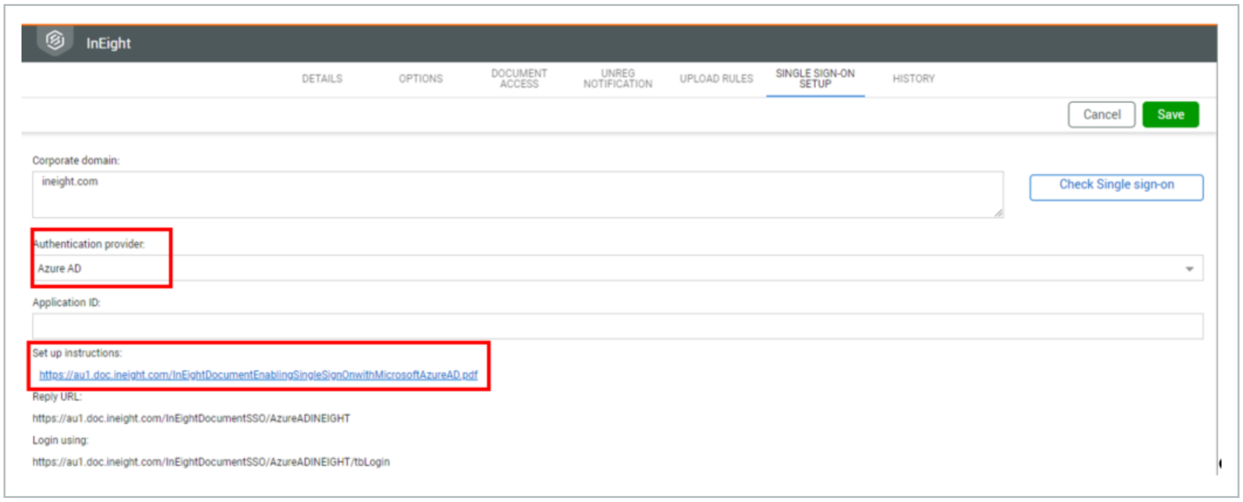


3. Click the Single Sign On Setup tab.



4. Enter the corporate domain into the Corporate domain section, an example is shown below.

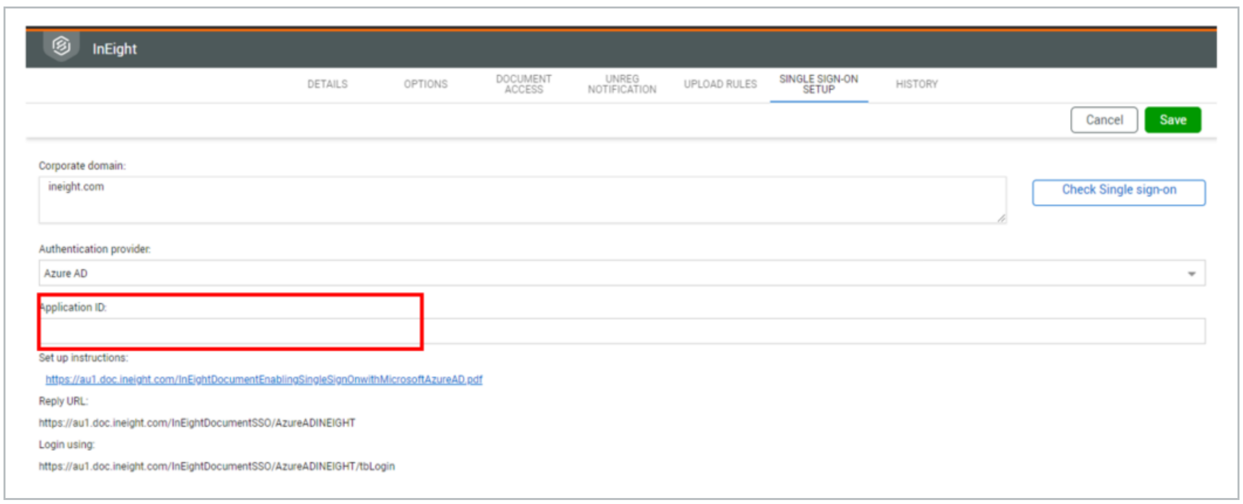
5. Select an Authentication Provider – Azure AD.



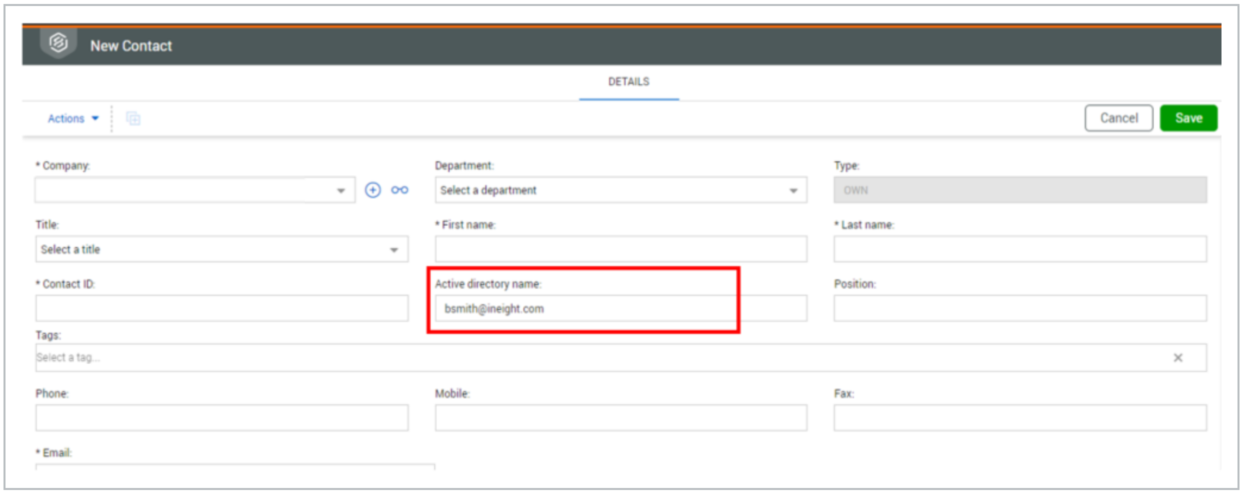
6. The setup instruction hyperlink will be available to download from here:

   Single Sign On Setup Instructions

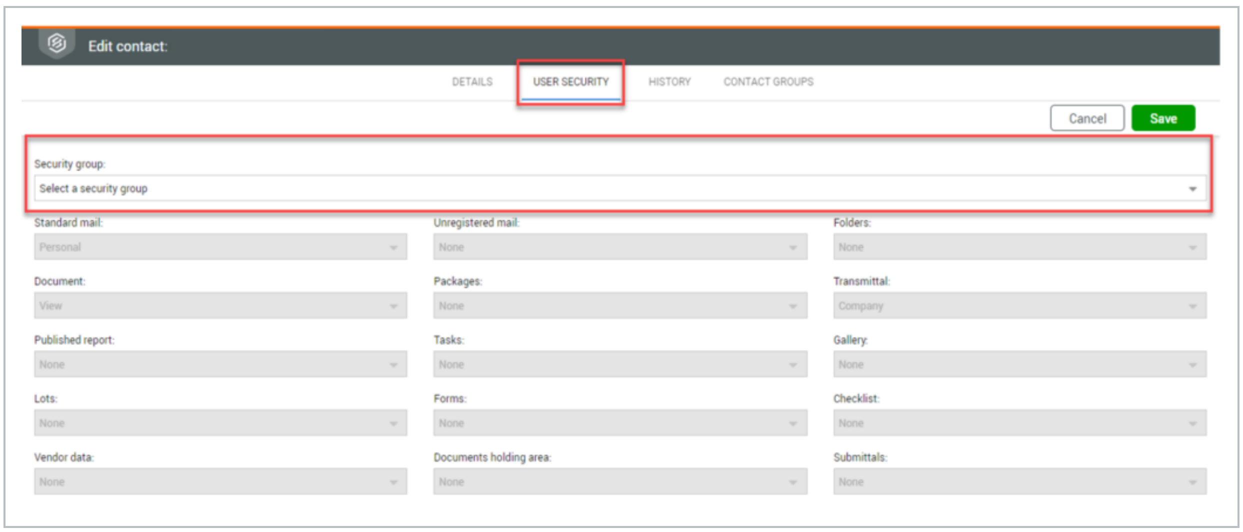
7. Complete the instructions which includes entering the Application ID.



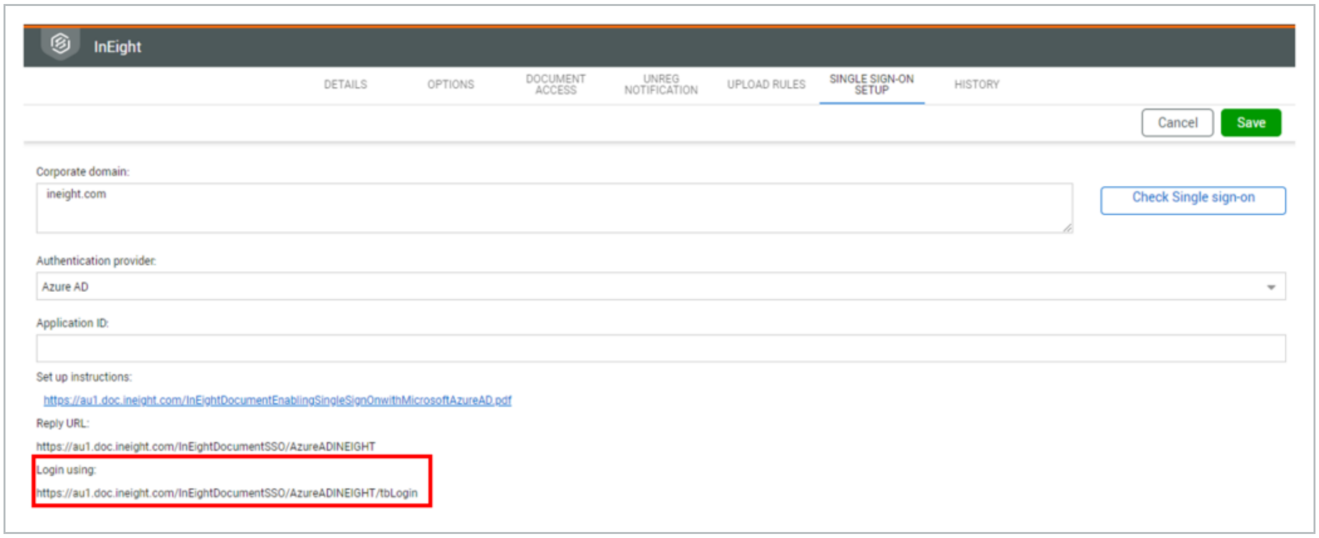
8. Enter the active directory name for each address book contact in the Active Directory Name field, for example, firstname.lastname@company.com.



9. Confirm that the contact has been added to the relevant security group.



What's next: Forward the Login using link shown at the bottom of the Single Sign-on page to Document users. They can then sign in to Document with their computer or organization credentials.



More information?

For further information, please contact InEight.

Email: support@ineight.com

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CHAPTER 2 – USING THE DASHBOARD

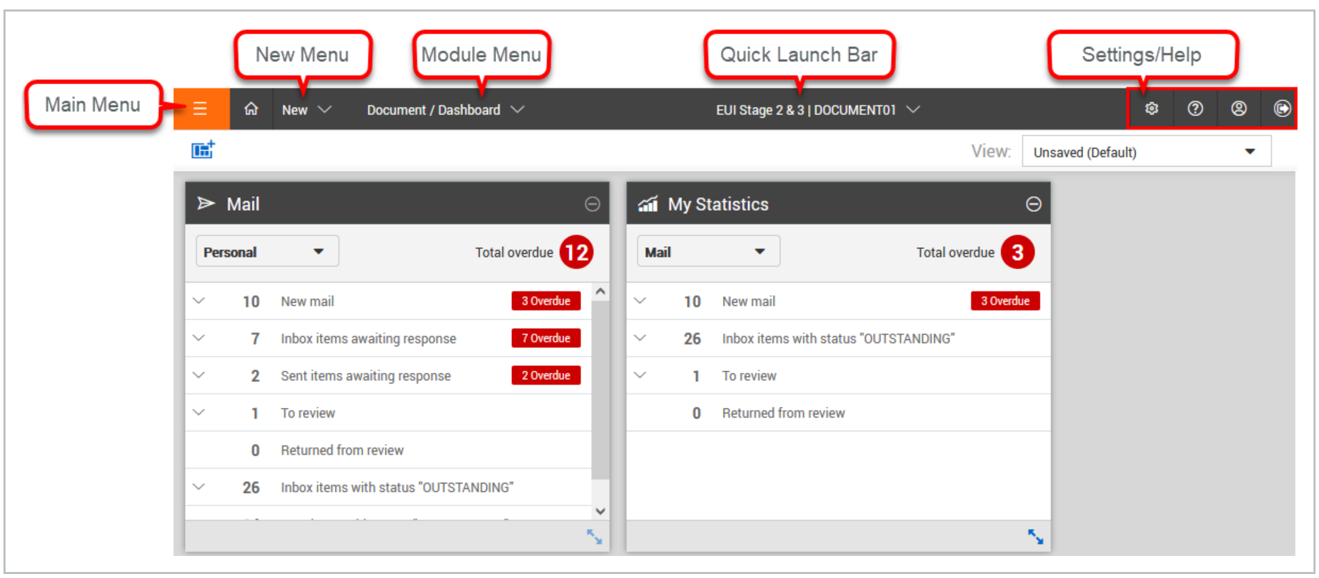
InEight Document's Dashboard is made up of tiles that show project information from each module. The Dashboard can be fully customized and you can add and remove different tile widgets.

For information on using the Dashboard, see the links below.

2.1 NAVIGATING THE DASHBOARD AND TOP MENUS

The Dashboard is made up of tiles that show you project information from each module. The tiles can be made bigger or smaller and tiles can be added and removed.

Access InEight Document modules by using the tile widgets or by using the drop-down menus on the top. There are four drop-down menus on top of the screen: **Main**, **New** ,**Module** , **Quick Launch bar**. In addition, **Settings/Help** can be accessed from the top-right menu items.



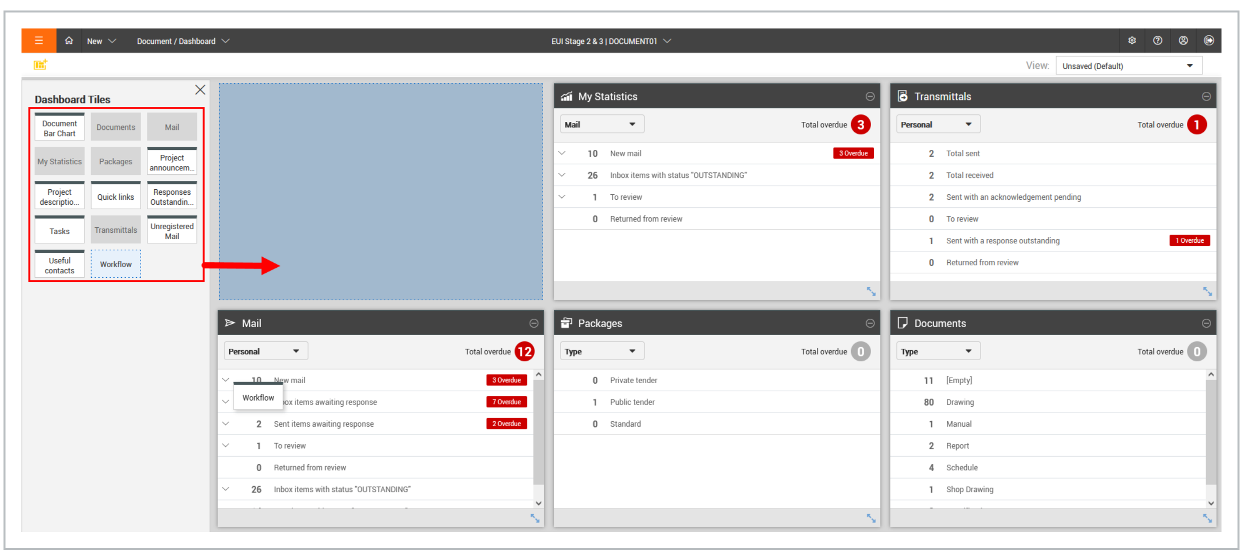
Menu Items	Description
Main Menu	Use the Main Menu to access your favorite projects, settings, all projects and InEight products you have access to.
New Menu	Use the New Menu to quickly create new items for each module you have access to.
Module Menu	Use this menu to switch between the different modules of the project.
Quick Launch Bar	Use the Quick Launch Bar to create quick launch links to access your most common functions.
Settings/Help	Use these menu options to access admin settings, help and user preferences.

2.2 USING DASHBOARD TILES

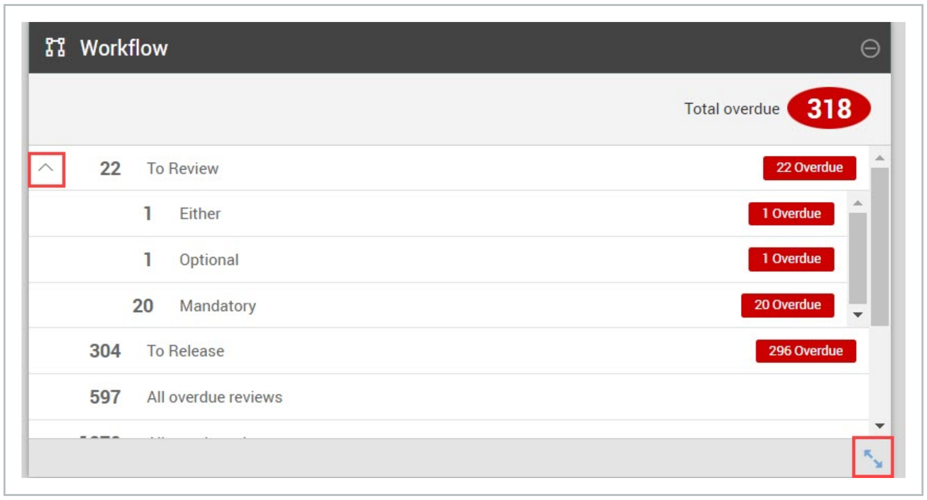
Dashboard tiles can be added and removed from the Dashboard. You can also adjust the size of the tiles and reorder them.

2.2.1 To add Dashboard tile widgets:

1. Click the **tile icon** in the top left corner of the screen to show a list of modules you can add.
2. Drag and drop the **module tile** into the Dashboard for the tile widget to display.

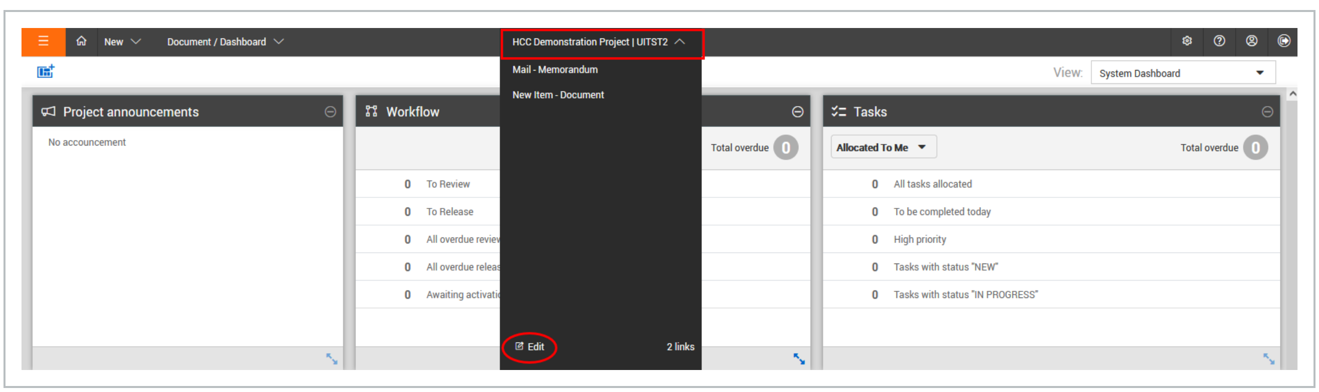


- To change the order of Dashboard tiles, click the **heading bar** to drag and drop the tile where you want to move it.
- To resize Dashboard tiles, click the **arrow icon** in the bottom right corner and drag the tile to make it smaller or larger.
- You can filter and drill down on the To review line of the Workflow and My statistics tiles to see how many reviews assigned to you are optional, mandatory, or either.



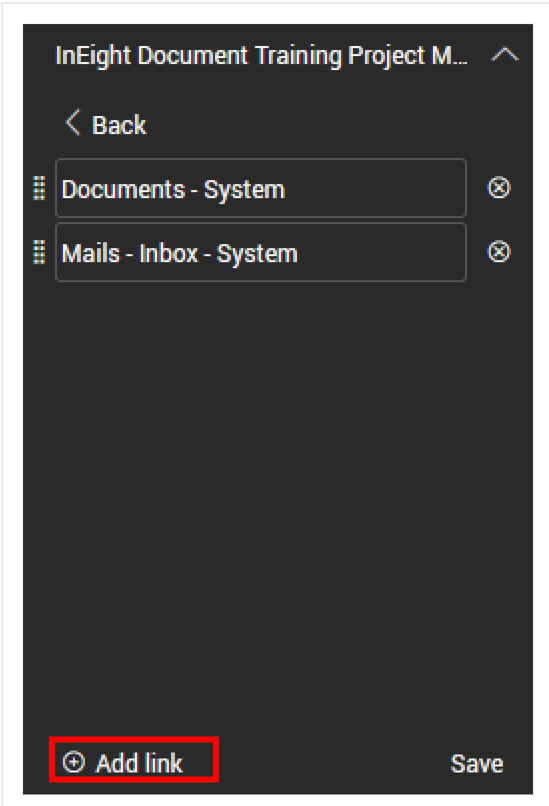
2.3 USING THE QUICK LAUNCH BAR

Link functions you use regularly to the quick launch bar by clicking **Edit** on the Quick Launch Bar

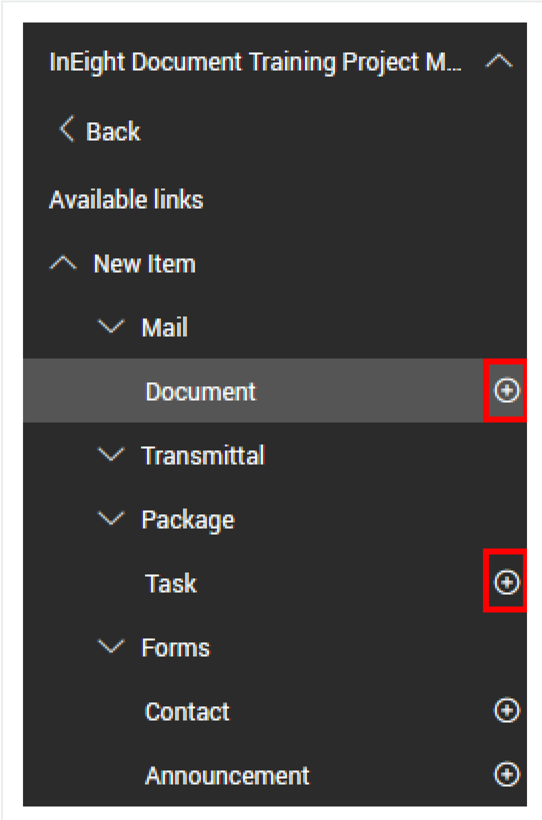


2.3.1 To create a quick launch link:

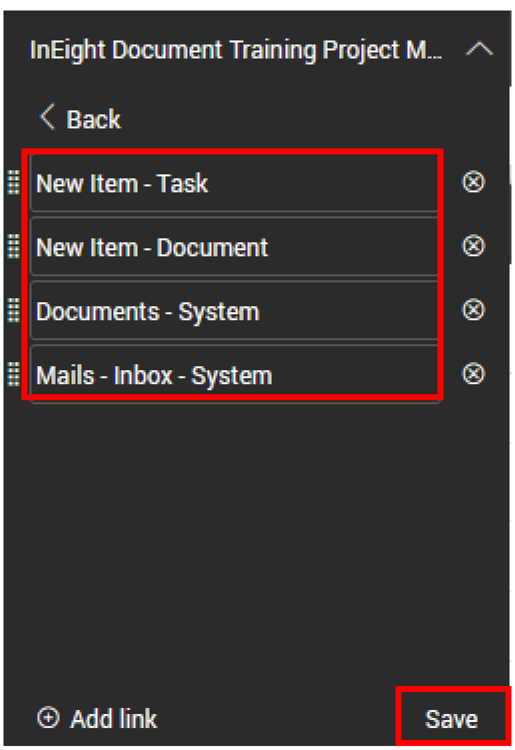
1. Click **Edit** and select **Add link**.



2. Click **plus** next to the new links you want to add, then click **Back**.

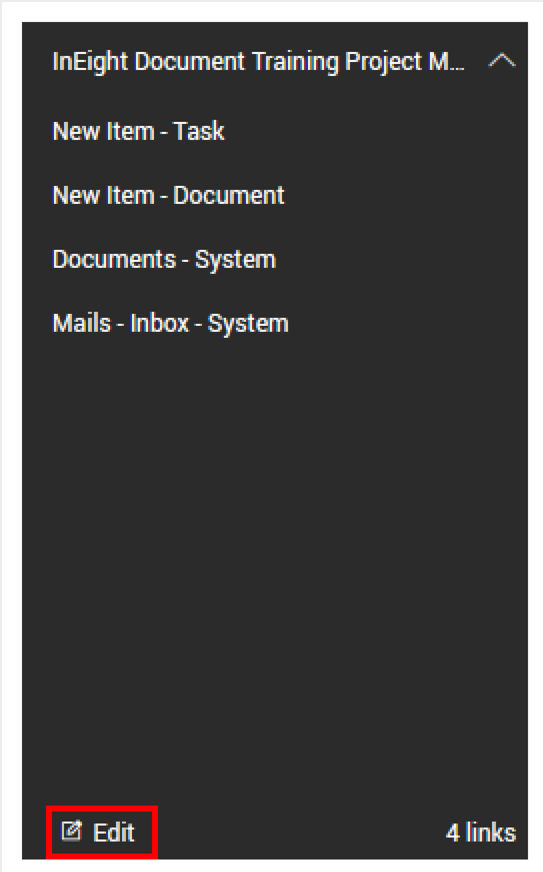


3. Update the name of the links if desired and click **Save.**

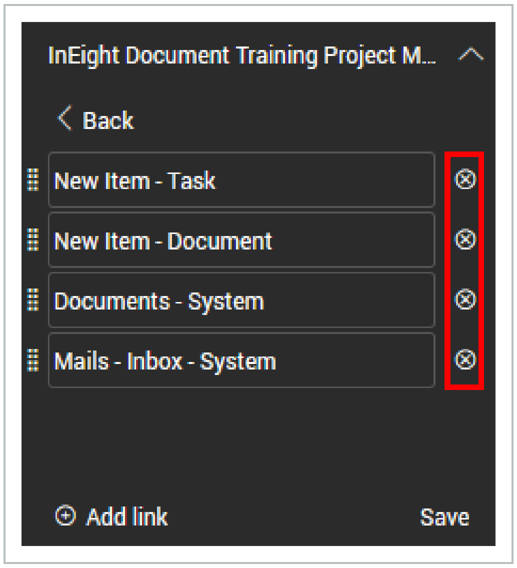


2.3.2 To delete a quick launch link:

1. Click **Edit** on the Quick Launch Bar.



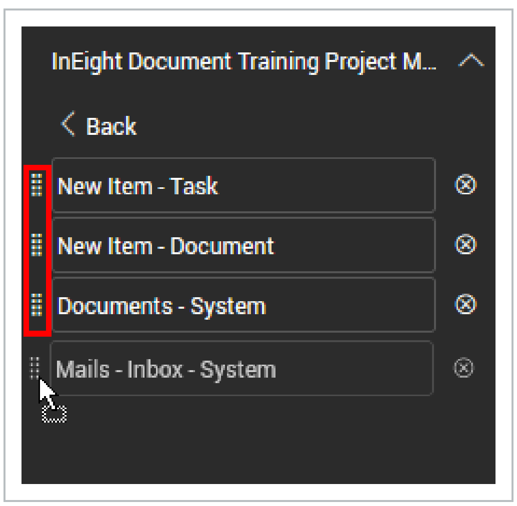
2. Click the **delete icon** next to the links you want to delete.



3. Click **Save**.

2.3.3 To change the order of quick launch links:

1. Click **Edit** and select the quick launch link.
2. Drag the link to the desired position.



3. Click **Save**.

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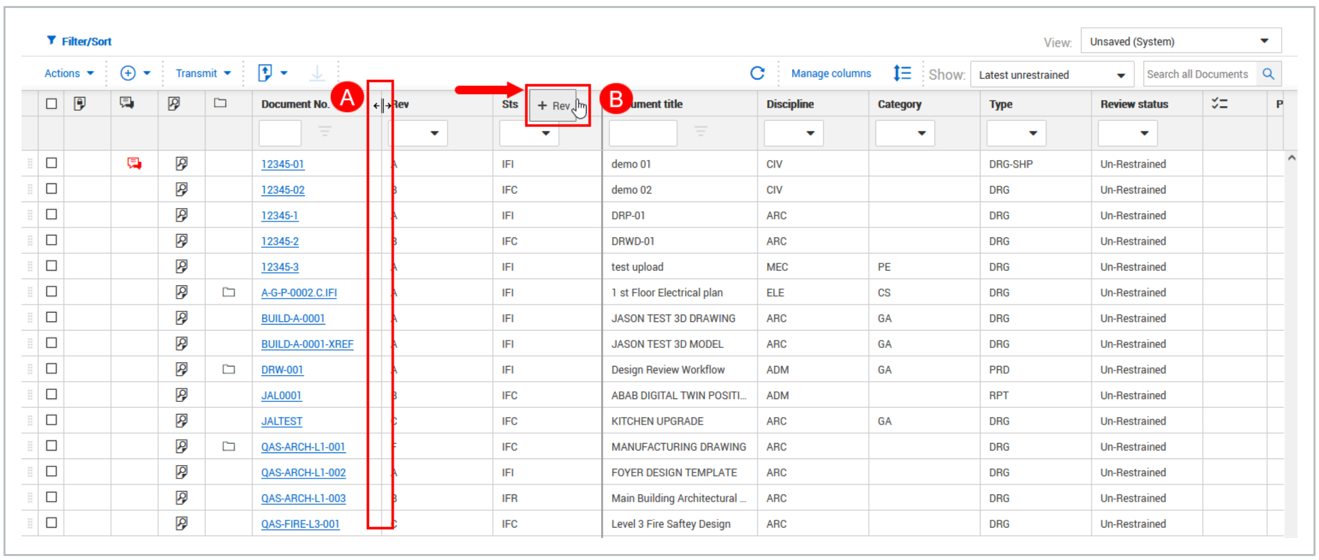
CHAPTER 3 – USING REGISTERS

InEight Document's different modules are made up of Registers. Registers contain information on the details of each module component.

For information on using Registers, see the links below.

3.1 CUSTOMIZING YOUR REGISTER

With the new user interface, you can customize the look and feel of your Register.



A. Resize each column by clicking on the edge of the column and using the arrows to resize.

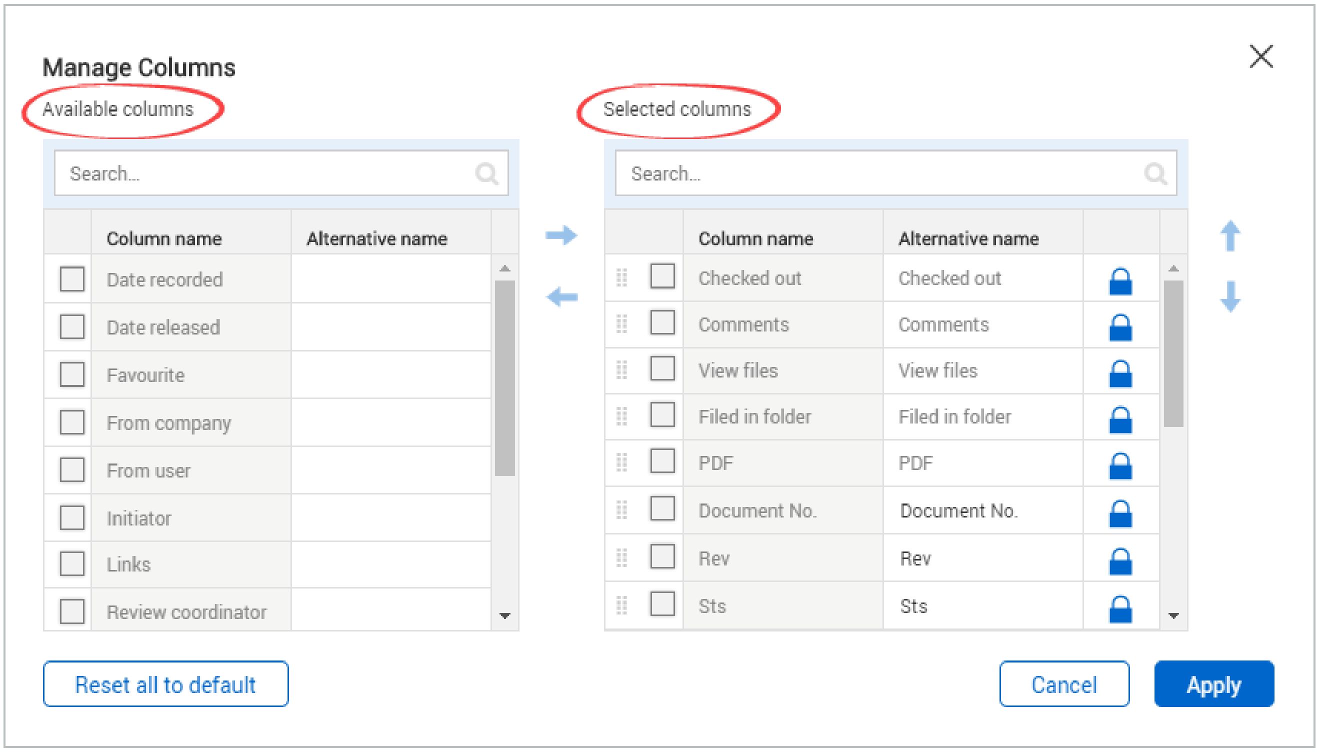
B. Move the position of each column by clicking on the header and dragging and dropping the column into position.

3.2 MANAGING REGISTER COLUMNS

Manage the order, titles and visibility of columns by clicking **Manage columns**.

On the left, **Available columns** lists all columns you can add to your Register.

On the right, **Selected columns** lists all columns currently in your Register.

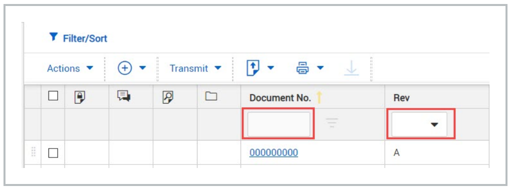


To lock a column so that it will always be shown in the Register, click the **lock icon** next to the column name in the **Selected columns** list.

3.2.1 Filter columns for specific information

You can filter columns to drill in on key information pertaining to your specific needs. You can filter multiple columns.

1. Click the text box in the column header.

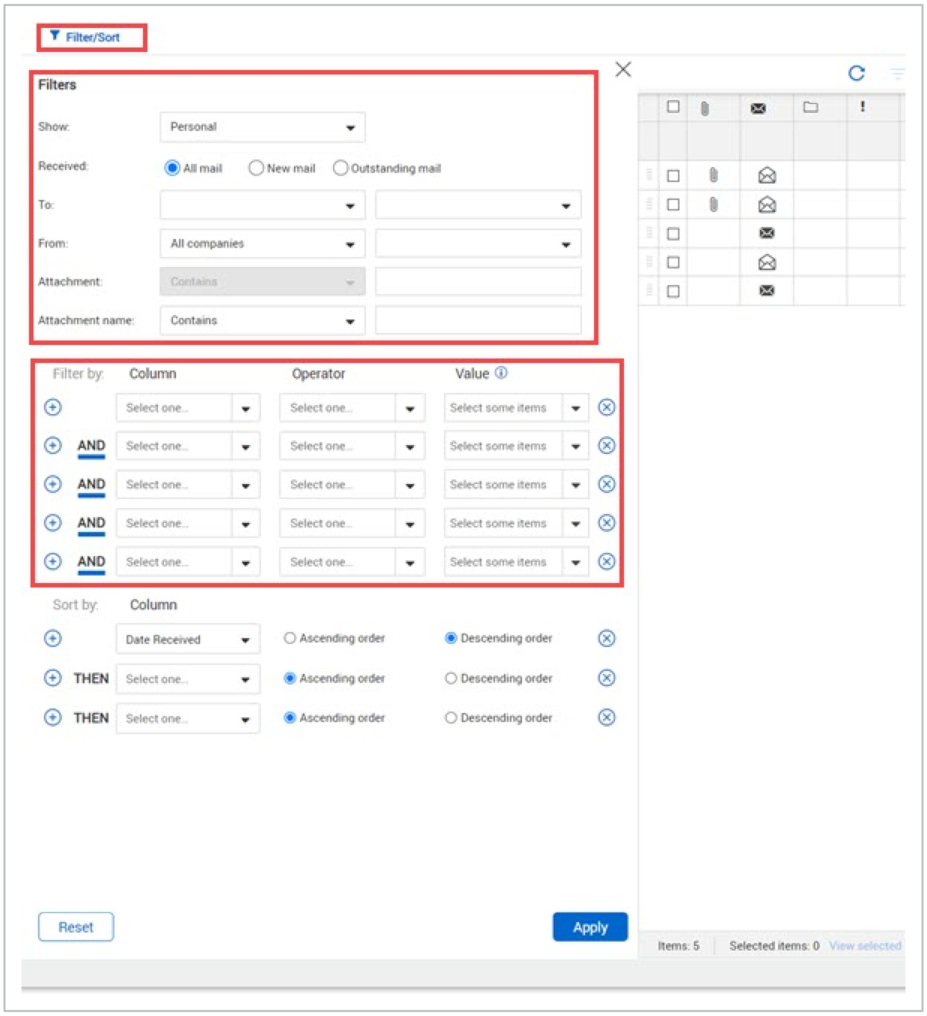


2. Enter filter information.
   - For free-text boxes, as shown in the Document No. column in the image above, enter text.
   - For drop-down list boxes, as shown in the Rev column in the image above, click the arrow, and then select a value.

3.2.2 Filter columns with operators

Operators let you expand column filters by including or excluding information. For example, you can limit the filter to items that are greater than a specific value or do not contain a specific string of characters.

1. Click **Filter/Sort** in the upper right of the register. The filters slide-out panel opens.



2. In the Filters section, enter information about the items you want to search through. This section varies by register. For example, the Mail register lets you specify whether to show personal or company mail, new mail, who the mail is to or from, and attachments.
3. In the Filter by section, select a column from the Column drop-down list.

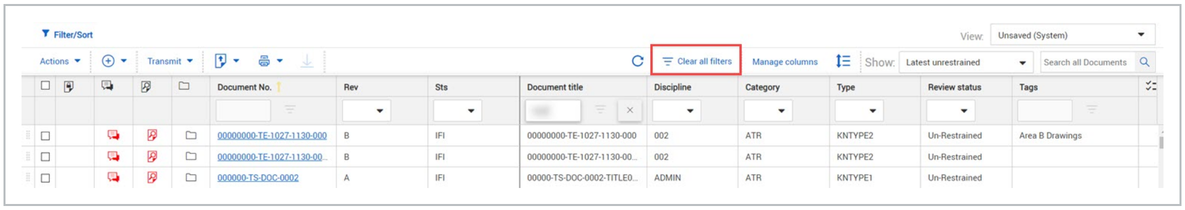
NOTE	The Documents register contains the Modules column that lets you filter based on the metadata of a linked deliverable or purchased item.

4. Select an operator from the Operators drop-down list, and then enter or select a value in the Value column. For example, for a Priority column, you could select the operator *Greater than* and the value *3* to show items with priority 1 or 2.
5. Optionally enter sort criteria to change the order of the entries.

6. Click **Apply**.

3.2.3 Clear all filters

Click **Clear all filters** in the left toolbar to clear all filters in the register.

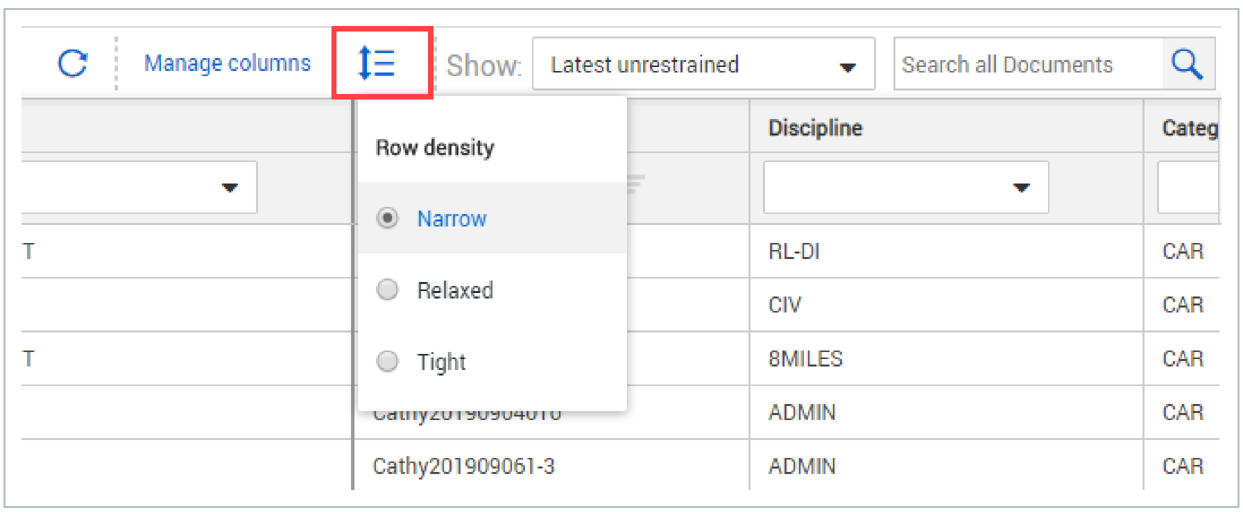


You can also click the **Reset** button on the Filters slide-out panel to clear filters.

3.2.4 Change row density

You can also change the row density for each Register.

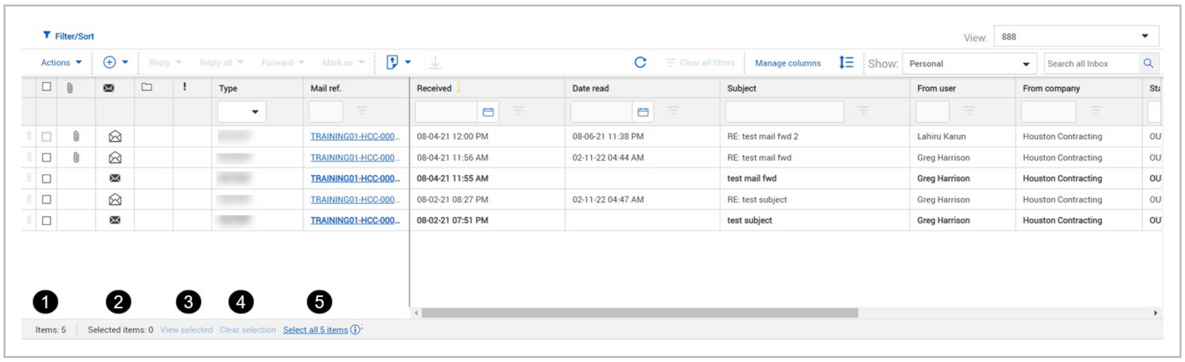
1. Click the **arrow icon**.
2. Select the row density from the drop-down menu.



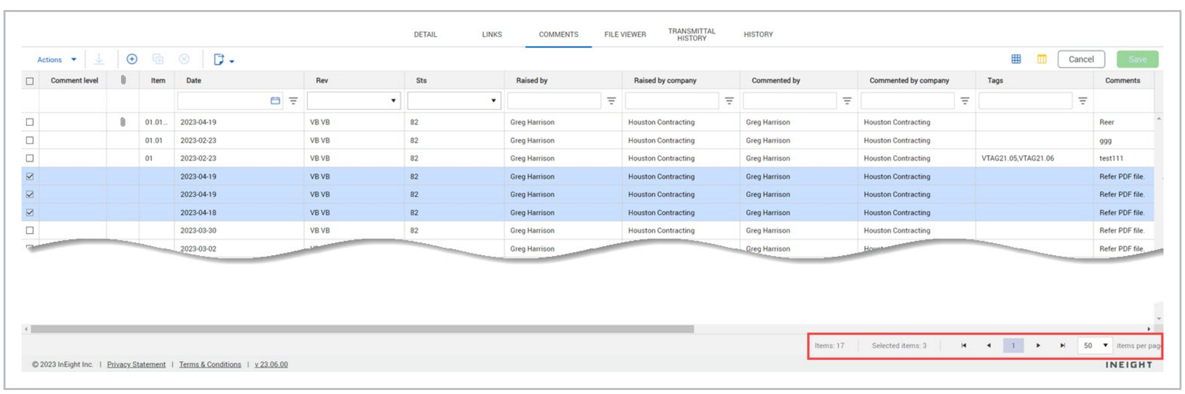
3.3 MANAGING REGISTER ROWS

Tools at the bottom of the register can help you manage the rows for selection.

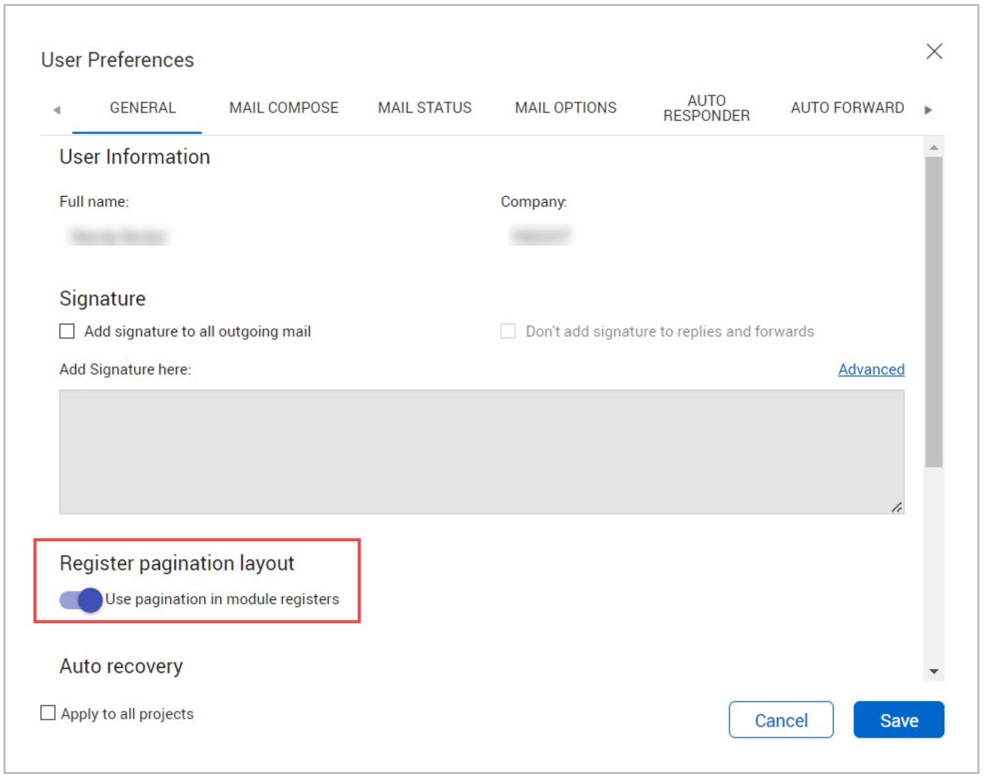
Number	Description
1	The number of items in the register.
2	The number of items currently selected.
3	Lets you view only the rows that you have selected.
4	Lets you deselect all rows that are currently selected.
5	Lets you select all items in the register. This option is shown only when there are fewer than 1000 items in the register. It is not shown when there are 1000 or more items.



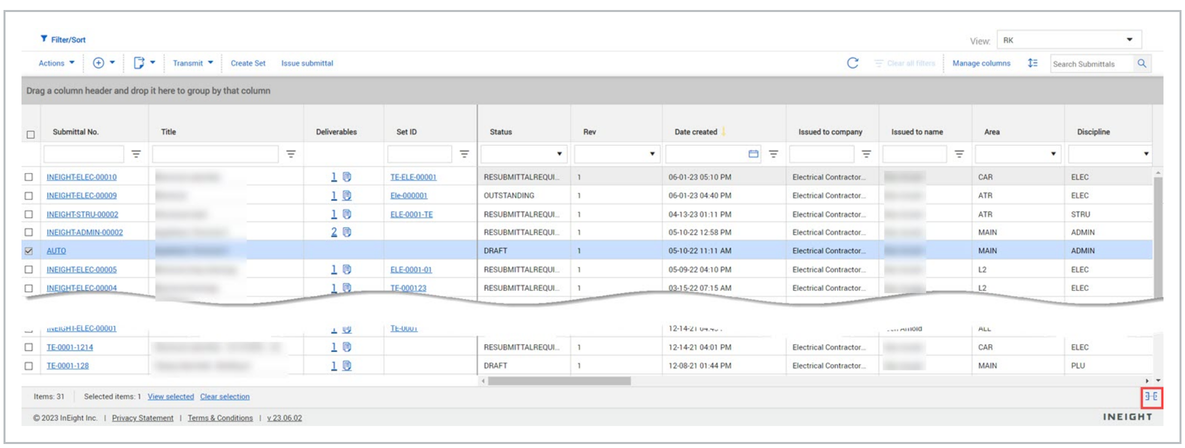
Some registers let you change from a detailed view to a simple view. The image above is an example of a detailed view. The detailed view offers infinite scrolling. The simple view offers pagination options. Tools at the bottom of the page, as shown in the image below let you specify the number of items shown per page, and you can then use the pagination arrows to go from page to page.



The paginated layout is configured for the project in the Miscellaneous tab of the project settings. When set to *Yes*, the Register pagination layout setting in your user preferences is enabled. If you want the option of switching from the detailed view to the paginated view, switch the toggle to *Yes*.



Registers open in the detailed view. If the paginated view is available, the bottom right toolbar shows an icon turn pagination on and virtual scrolling off. To switch to the paginated view, click theicon. The view changes to paginated view. You can click the icon again to turn on virtual scrolling and turn off pagination.

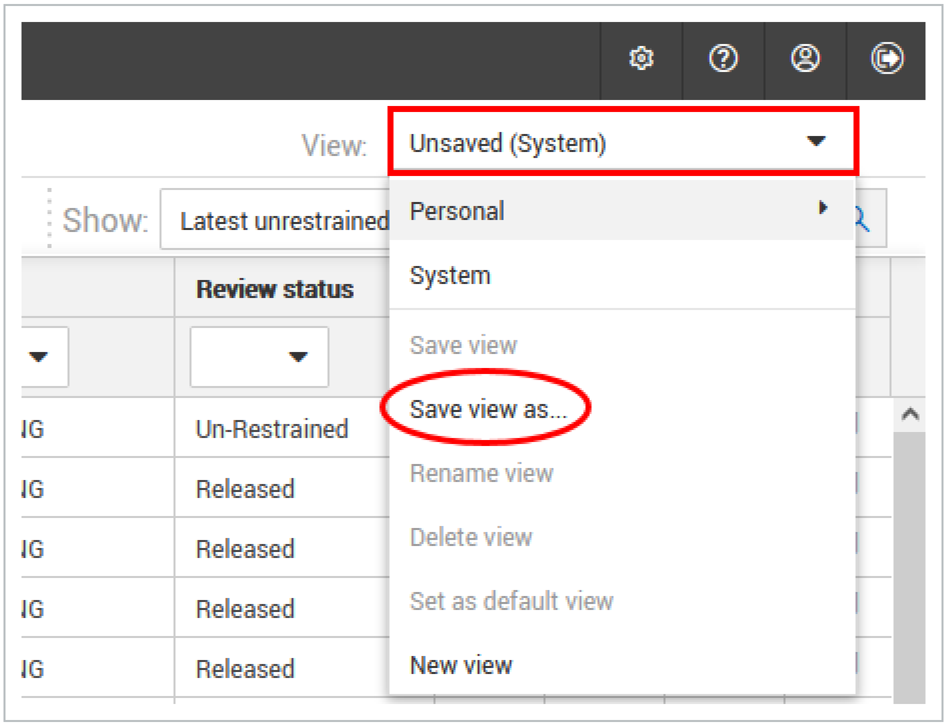


3.4 USING REGISTER VIEWS

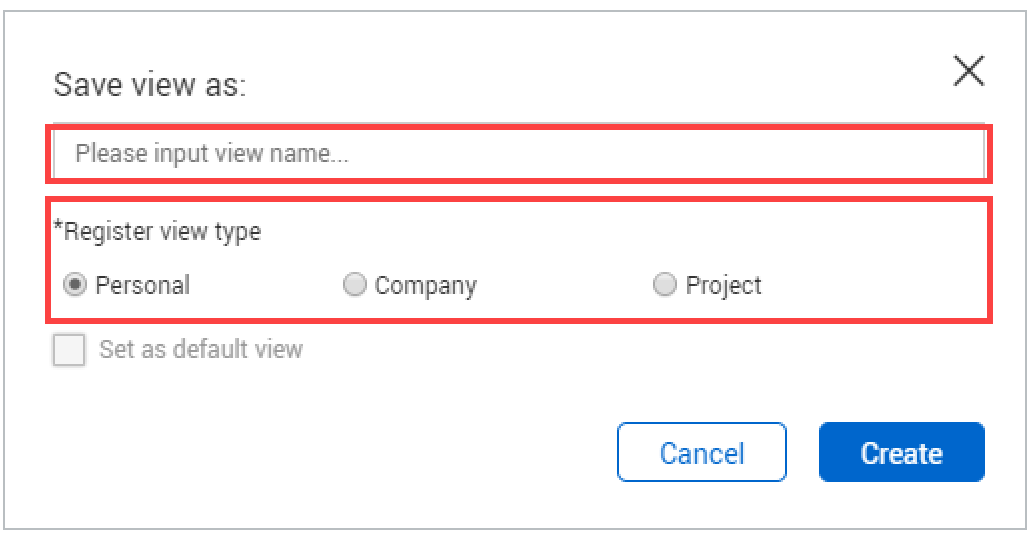
Dashboard and Register configurations can be saved, along with filter conditions for different Registers.

3.4.1 To create a new view:

1. Click the **View** drop-down menu and select **Save view as**.



2. Enter the name of the view.
3. Select the register view type.



4. To set this view as the default Register view, select the **Set as default view** option. You can only select this if the Register view type is company or project. Only administrators can access this

function.

5. Click **Create**.

3.4.2 To access saved views:

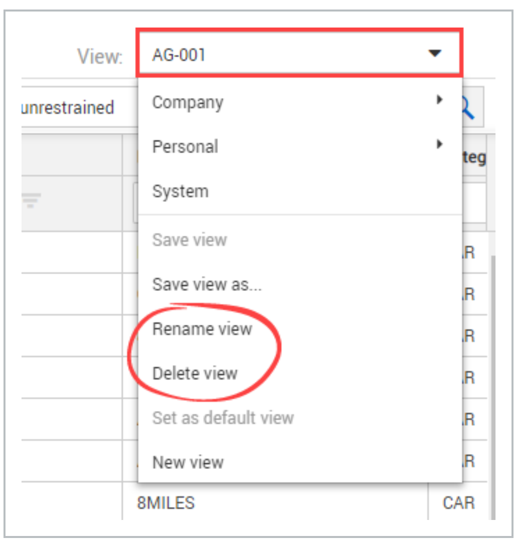
Saved views are accessed by clicking the **View** drop-down menu and selecting from the following:

- **Project views** are visible to anyone on the project.
- **Company views** are visible to anyone in the user's company.
- **Personal views** are visible to the individual user.
- **System view** is the default view for the project and is visible by anyone on the project.

3.4.3 To rename or delete a view:

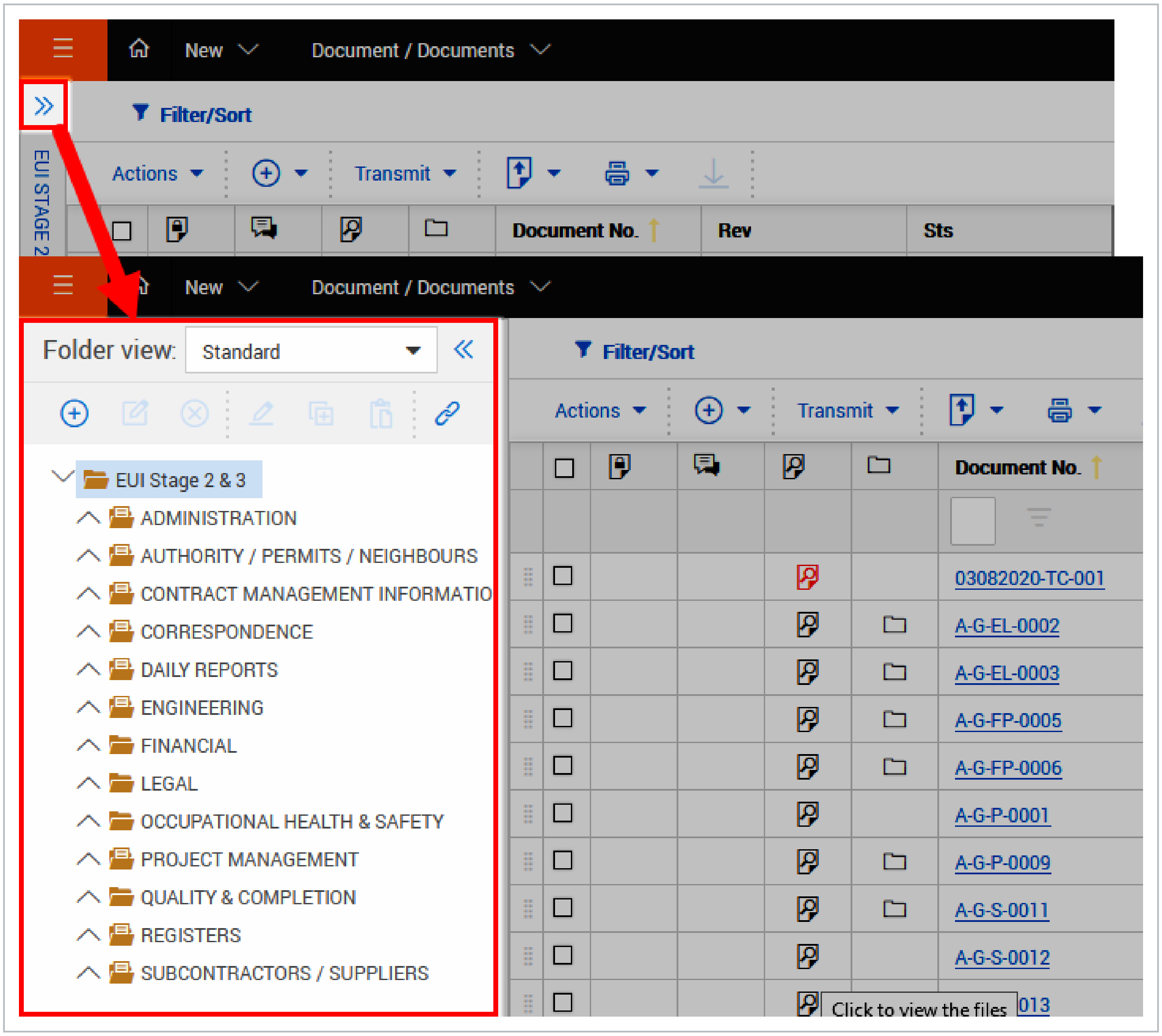
1. Click the **View** drop-down menu.
2. Select either:

- **Rename view**.
- **Delete view**.



3.5 USING STANDARD FOLDERS

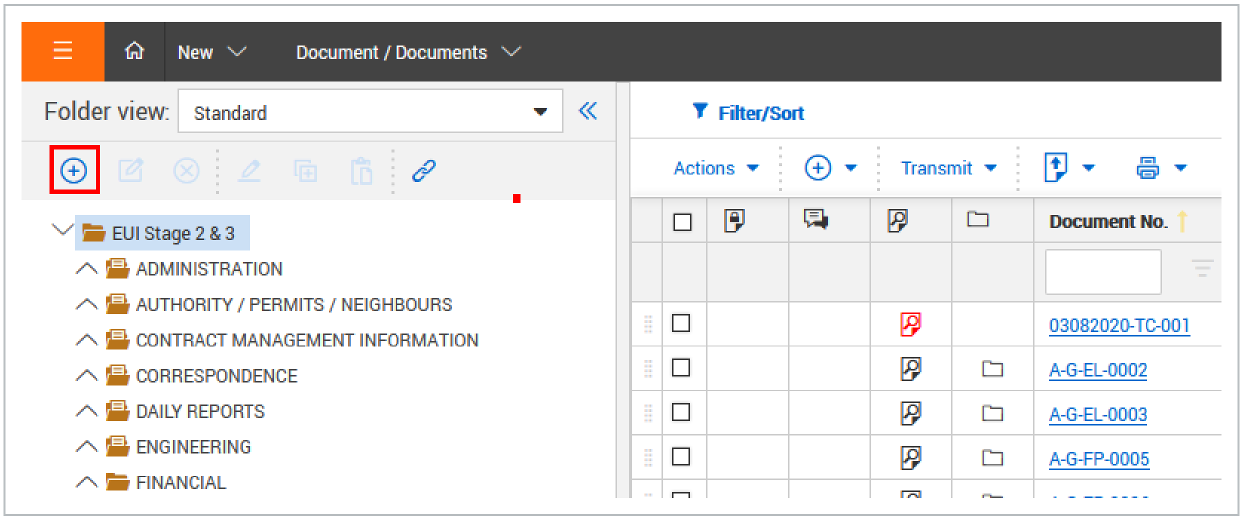
Folders can be used to help filter and sort files into a format that suits the project requirements. Next to **Filter/Sort**, click the **arrow icon** to show the folder structure.



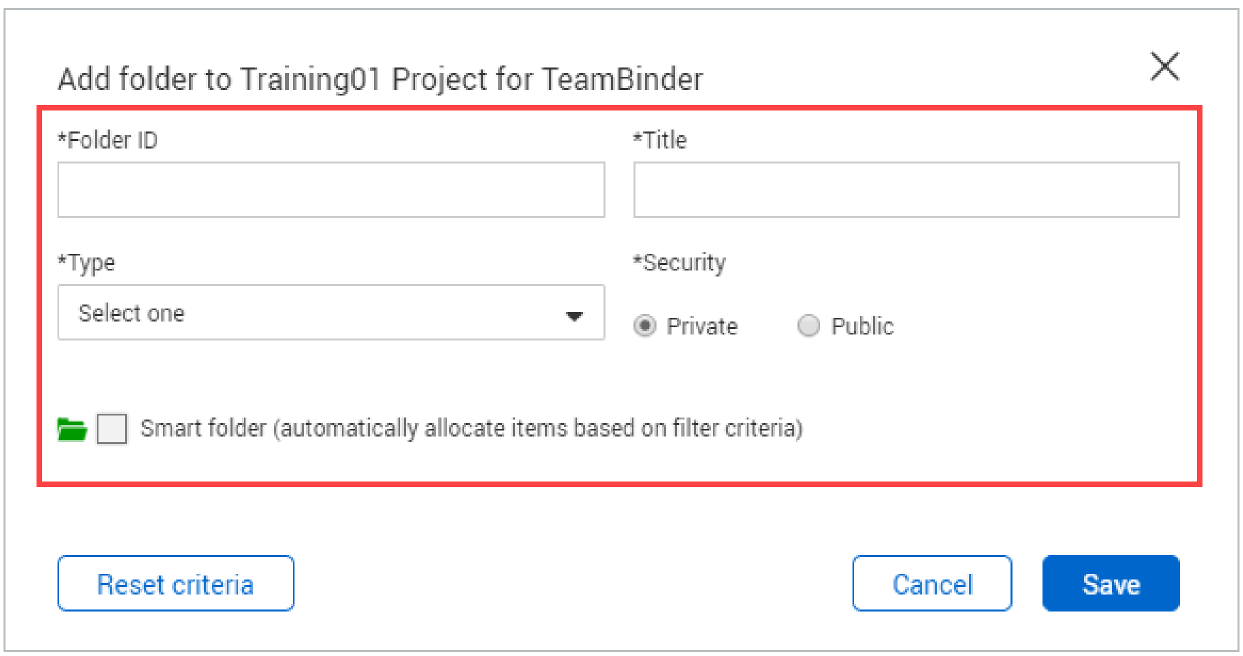
- Drag and drop items from the Register into the required folder.
- When you select the folder, the Register will only display the content that has been moved to that folder.
- Files will never be removed from the original Register. Folders help you organize and access existing Register content.

3.5.1 To create a new folder:

1. Click the **plus icon**.



2. Enter in the folder ID and title.
3. Select the type and security preferences for the folder.
4. To make the folder a smart folder, select the check box at the bottom.



5. Click **Save**.

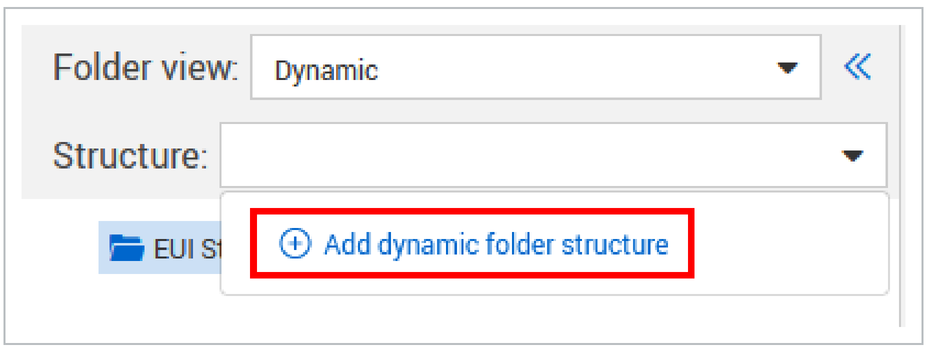
NOTE	Smart folders automatically allocate items based on filter criteria.

3.6 USING DYNAMIC FOLDERS

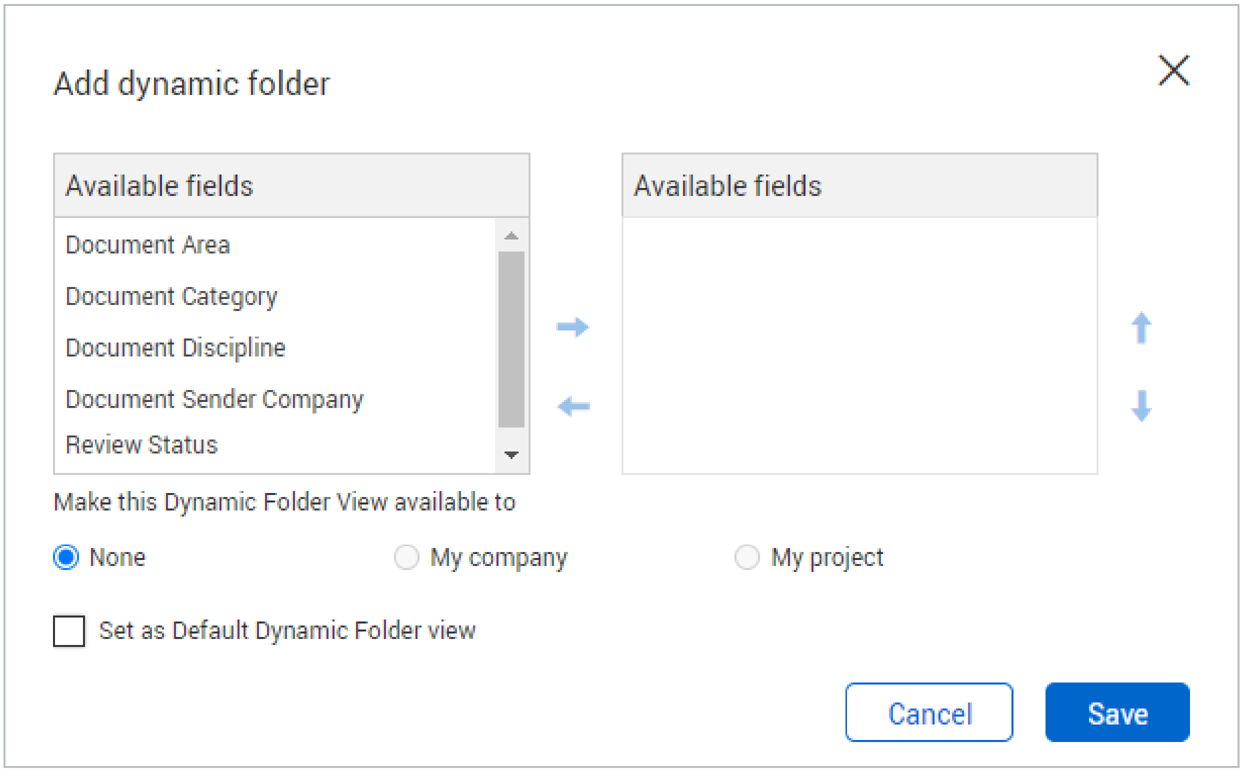
While Smart Folders can be used to automate the filing process, Dynamic folders can automate both the process of creating folders and the filing process of data into the created folders. For example, if a document is uploaded to a discipline that no folder exists for, one will be created and the document filed automatically.

3.6.1 Define a Dynamic Folder Structure

1. With the folder pane displayed from within any of the main registers, for the **Folder View**, select **Dynamic**.



2. Click the **Structure** dropdown and select **Add dynamic folder structure.**



3. Select the top level field of your Dynamic folder structure from the list of available fields and click the arrow button to move the field into the Assigned fields list.
4. Repeat for the field required at the next level down within the Dynamic folder structure.
5. If the Dynamic Folder structure is to be made available to other users within your company or users within other companies, click the relevant option against **Make this Dynamic Folder view available to**.
6. Click **Save**. Your new Dynamic folder view will now be available via the Structure drop down list at the top of the folder pane.

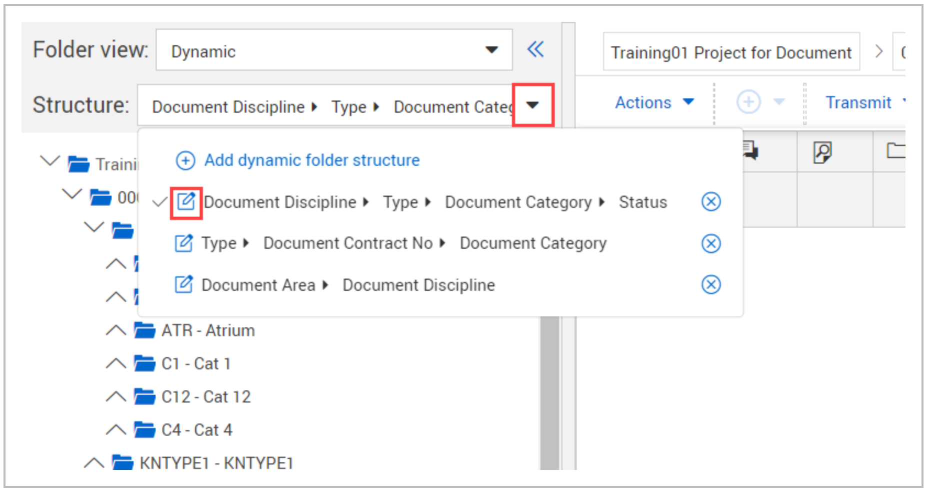
NOTE

- To make a Dynamic Folder view as the default folder view, tick the box against **Set as Default Dynamic Folder view**.
- Multiple Dynamic Folder structures can be defined.

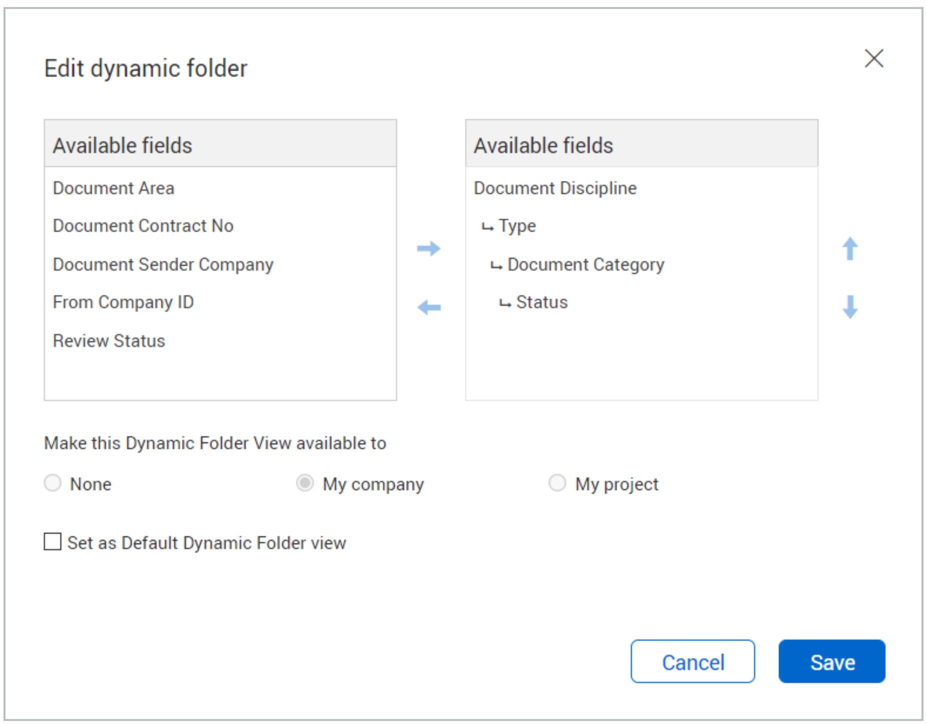
3.6.2 Edit a Dynamic Folder

You can edit a dynamic folder to change the available fields, the availability of the folder, and the default dynamic folder view.

1. From the Documents register, change the folder view to Dynamic.
2. Click the **Down arrow** in the Structure field to expand the structure.



3. Click the **Edit** icon for the folder structure. The Edit dynamic folder dialog box opens.



4. Edit the values as needed, and then click **Save**.

3.6.3 Delete a Dynamic Folder

You can delete a dynamic folder when it is no longer used.

Only folders that are available to *My company* and *None* can be deleted.

1. From the Documents register, change the folder view to Dynamic.
2. Click the **Down arrow** in the Structure field to expand the structure.
3. Click the Delete icon next to the folder you want to delete. A deletion message box opens.
4. Click **Yes** to confirm and delete the folder.

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CHAPTER 4 – USING DASHBOARD TILES

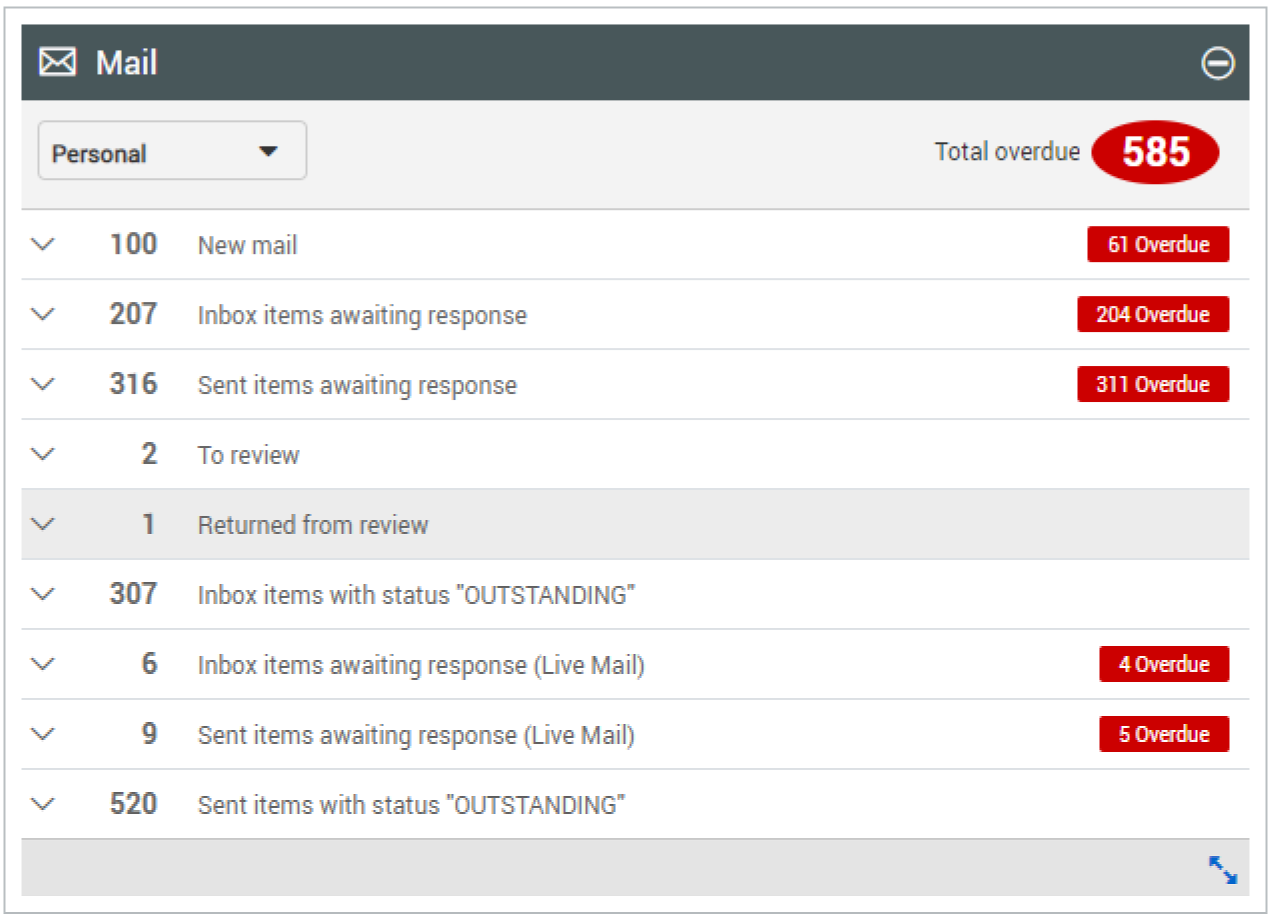
Dashboard tile widgets show statistics for different modules. Clicking on the Header of the dashboard tile will take you to the relevant register.

For information on using tile widgets, see the links below.

4.1 UNDERSTANDING TILE WIDGETS

The Dashboard is made up of tile widgets that show statistics for the different modules. See below for information on the different statistics available for each module.

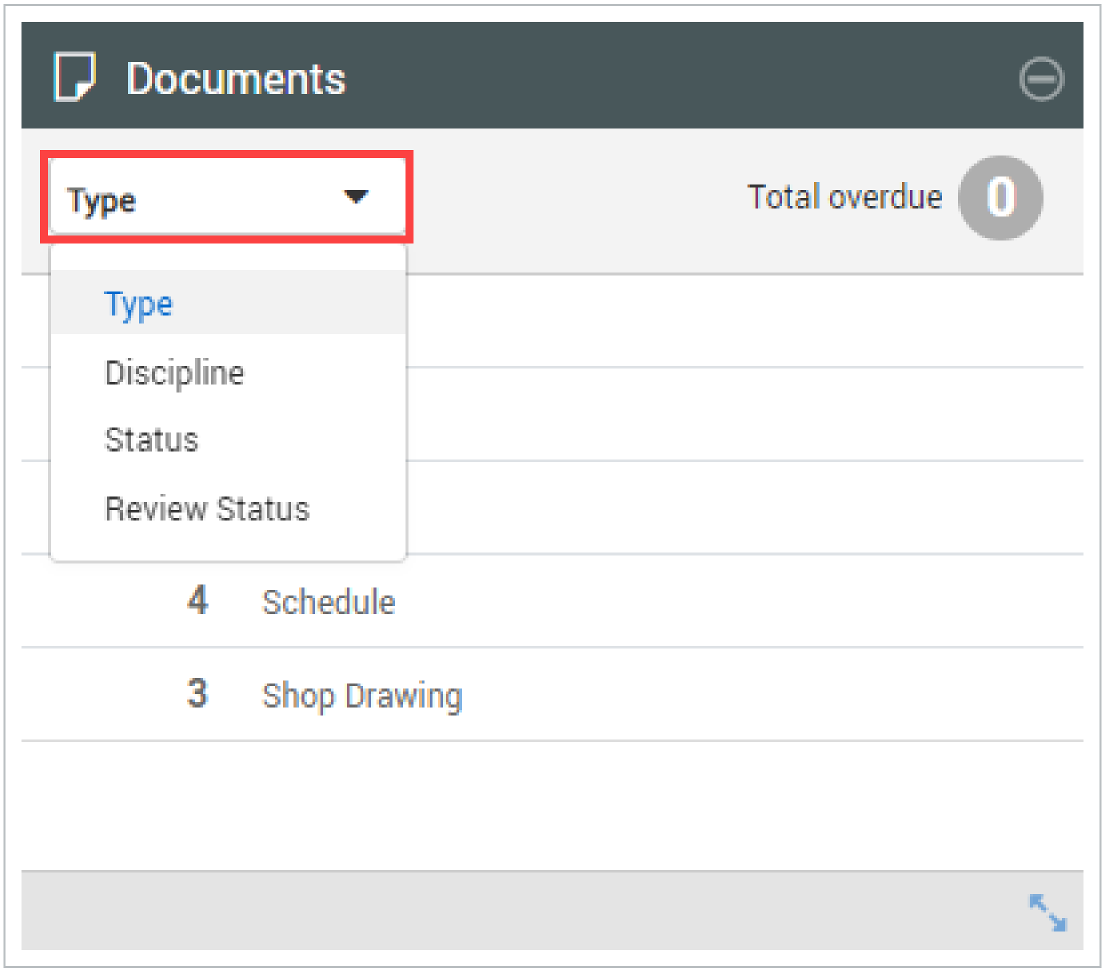
4.1.1 Mail Dashboard tile



Mail Statistics	Explanation
New mail.	Mail items received but not read yet.
Inbox items awaiting response.	Mail items received that require a response.
Sent items awaiting response.	Sent items that are waiting for a response.
To review.	Mail items prepared by others and submitted for your review.
Returned from review.	Mail items returned from review that are ready for sending.
Inbox items with status "OUTSTANDING".	Mail items received that have a status of outstanding.
Inbox items awaiting response (Live Mail).	Received mail items that have not yet been responded to.
Sent items awaiting response (Live Mail).	Sent mail items which have not yet been responded to.
Sent items with status "OUTSTANDING".	Mail items sent that currently have a status of outstanding.

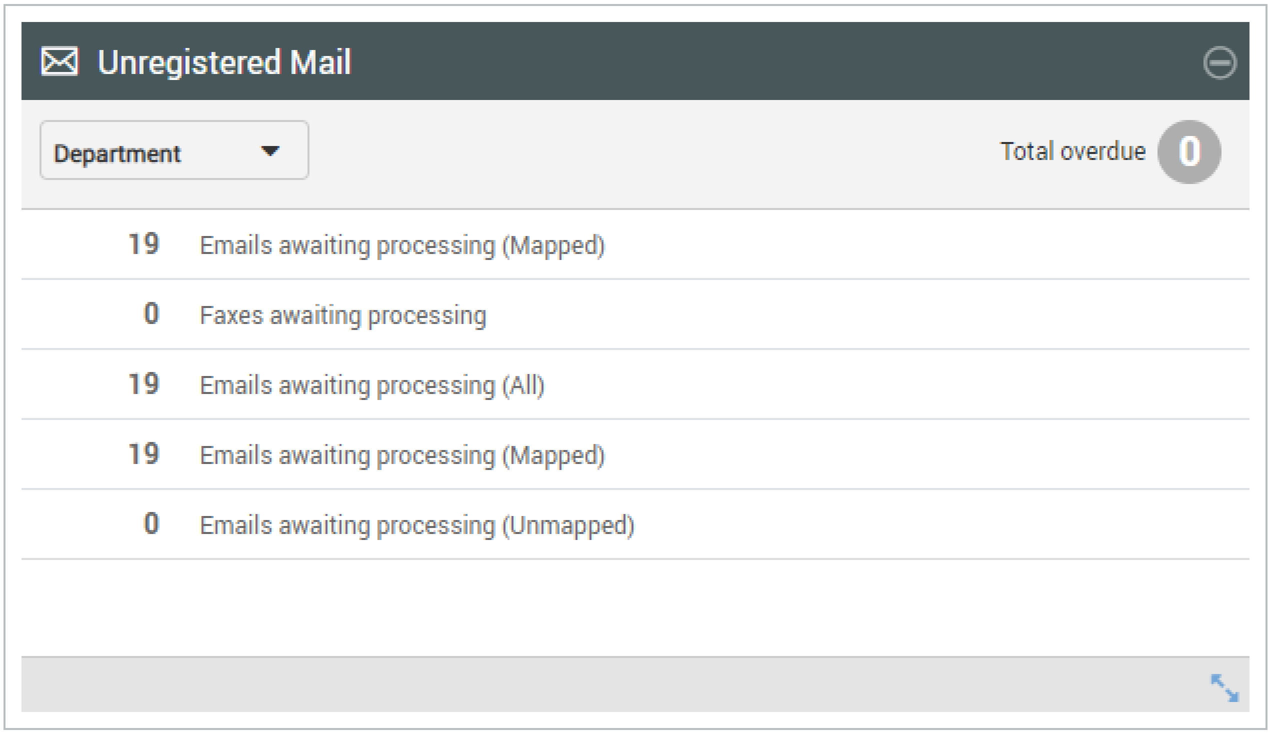
4.1.2 Documents Dashboard tile

There are four options for displaying document statistics on the Document widget. Click the drop-down menu to select an option.



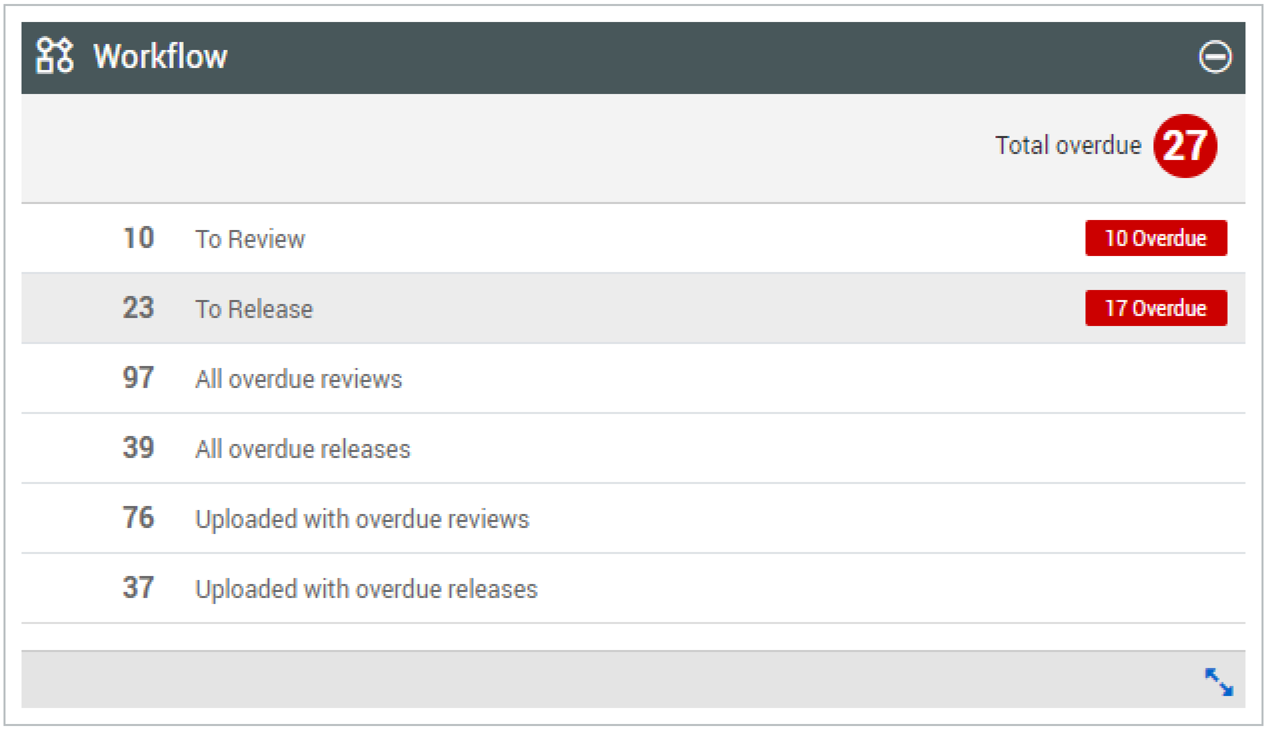
Document Statistics	Explanation
Type.	A list of documents grouped by type.
Discipline.	A list of documents grouped by discipline.
Status.	A list of documents grouped by status.
Review Status.	A list of documents grouped by review status.

4.1.3 Unregistered Mail Dashboard tile



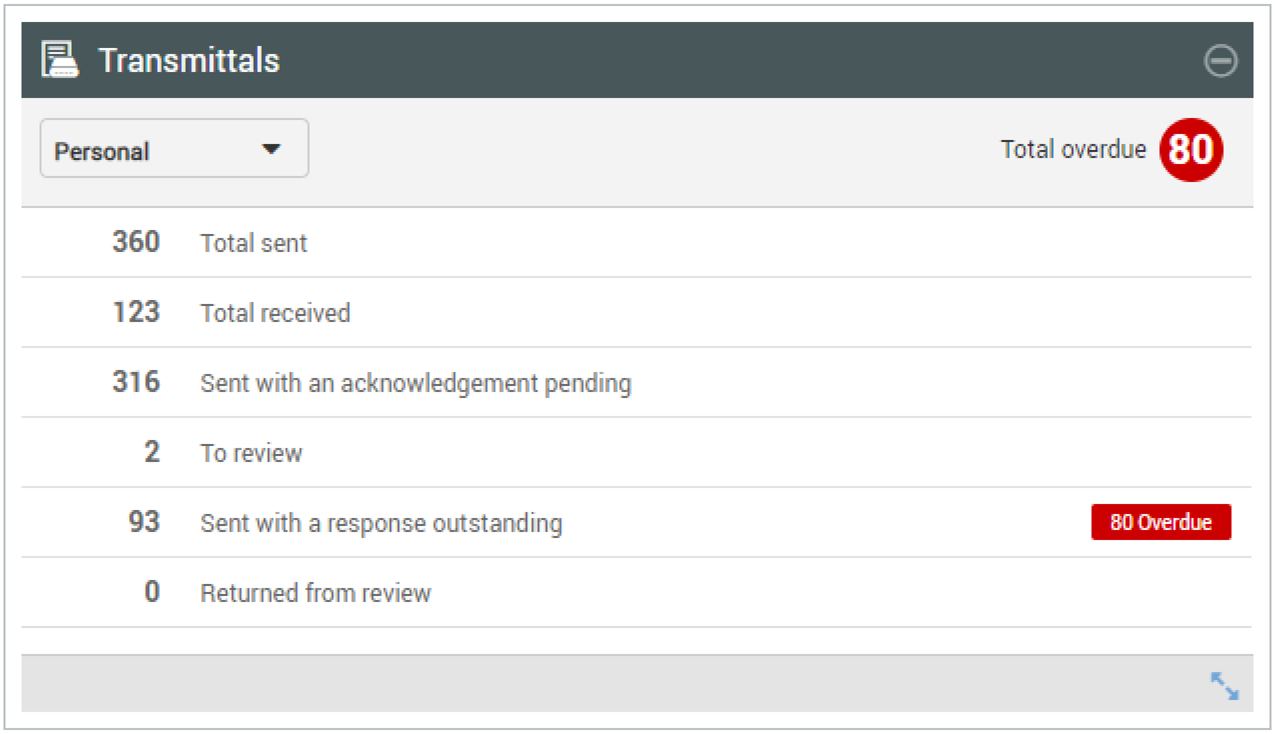
Unregistered Mail Statistics	Explanation
Unregistered Mail.	Mail incoming from outside of InEight Document
Faxes awaiting processing.	Incoming faxes not processed yet.
Emails awaiting processing (All).	Incoming emails not processed yet.
Emails awaiting processing (Mapped).	Incoming mapped emails that are not processed yet.
Emails awaiting processing (Unmapped).	Incoming emails that are not mapped and not processed yet.

4.1.4 Workflow Dashboard tile



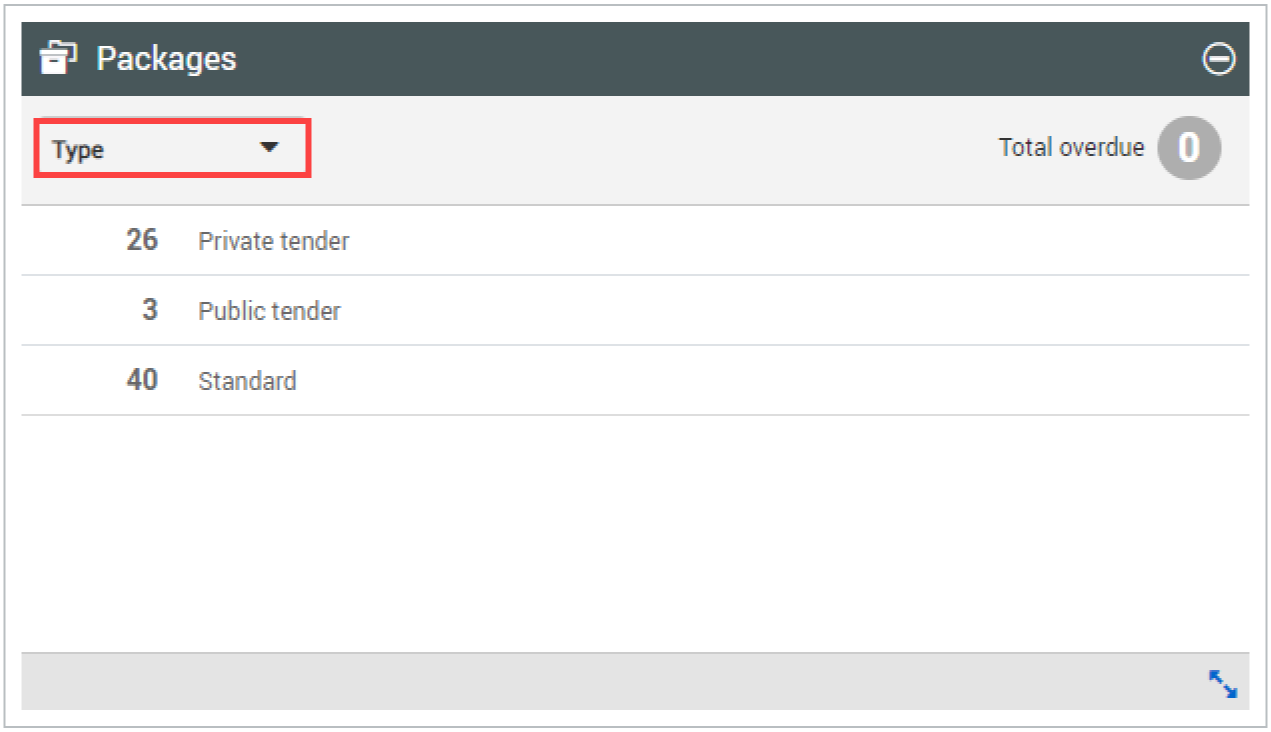
Workflow Statistics	Explanation
To Review.	Shows the documents you are required to review.
To Release.	Shows the documents where you are the Review Coordinator and are required to review and release.
All overdue reviews.	Shows the number of documents where your review is now overdue.
All overdue releases.	Shows the Review Coordinator the number of documents where the review is complete, but the release is overdue.
Uploaded with overdue reviews.	Shows the total number of documents uploaded where the review is overdue.
Uploaded with overdue releases.	Shows the total number of documents uploaded where the release is overdue.
Awaiting Activation.	Shows the number of documents that are awaiting review activation that you are the Review Initiator for.

4.1.5 Transmittals widget



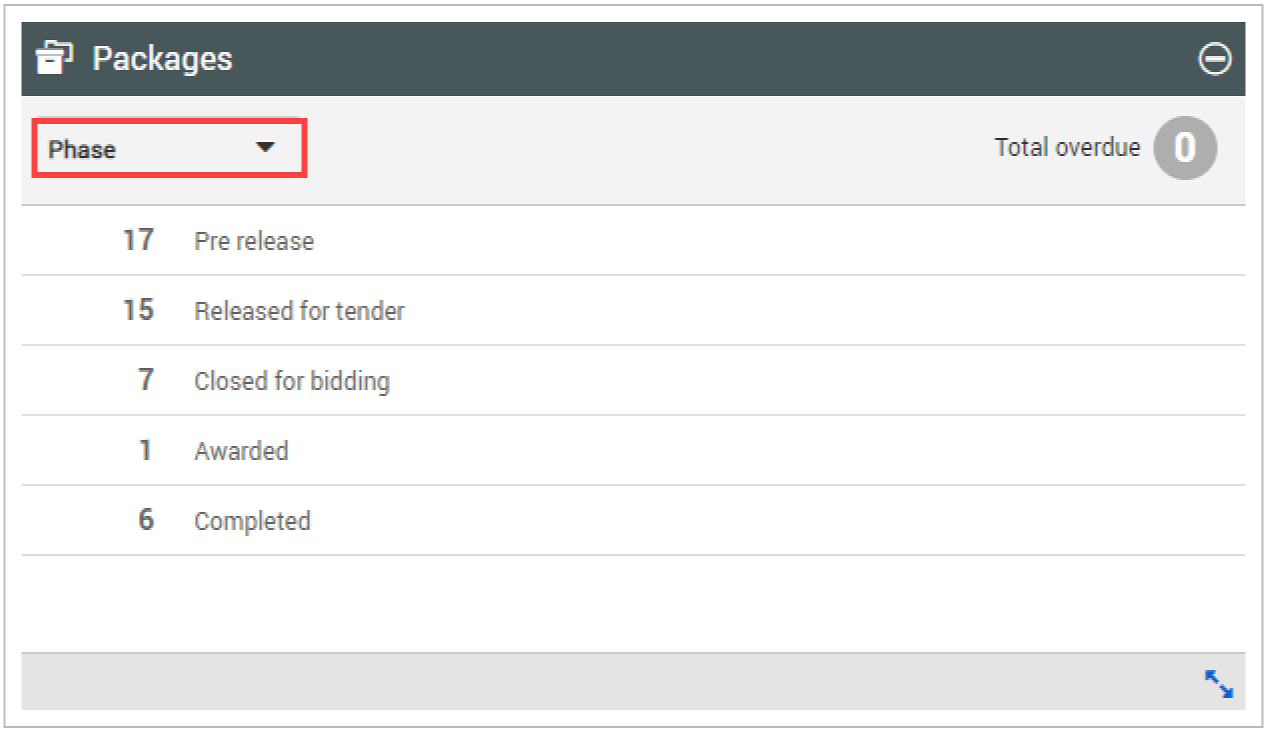
Transmittals Statistics	Explanation
Total sent.	Total number of transmittals sent.
Total received.	Total number of transmittals received.
Sent with acknowledgement pending.	Number of transmittals sent which have not been acknowledged as received by the recipient.
To review.	Number of transmittals awaiting your review.
Sent with a response outstanding.	Number of transmittals sent requiring a response and are still outstanding.
Returned from review.	Number of transmittals returned from review and are waiting to be sent.

4.1.6 Package Dashboard tile – Type



Packages Statistics by Type	Explanation
Private tender.	Total number of private tender packages.
Public Tender.	Total number of public tender packages.
Standard.	Total number of standard packages.

4.1.7 Package Dashboard tile – Phase

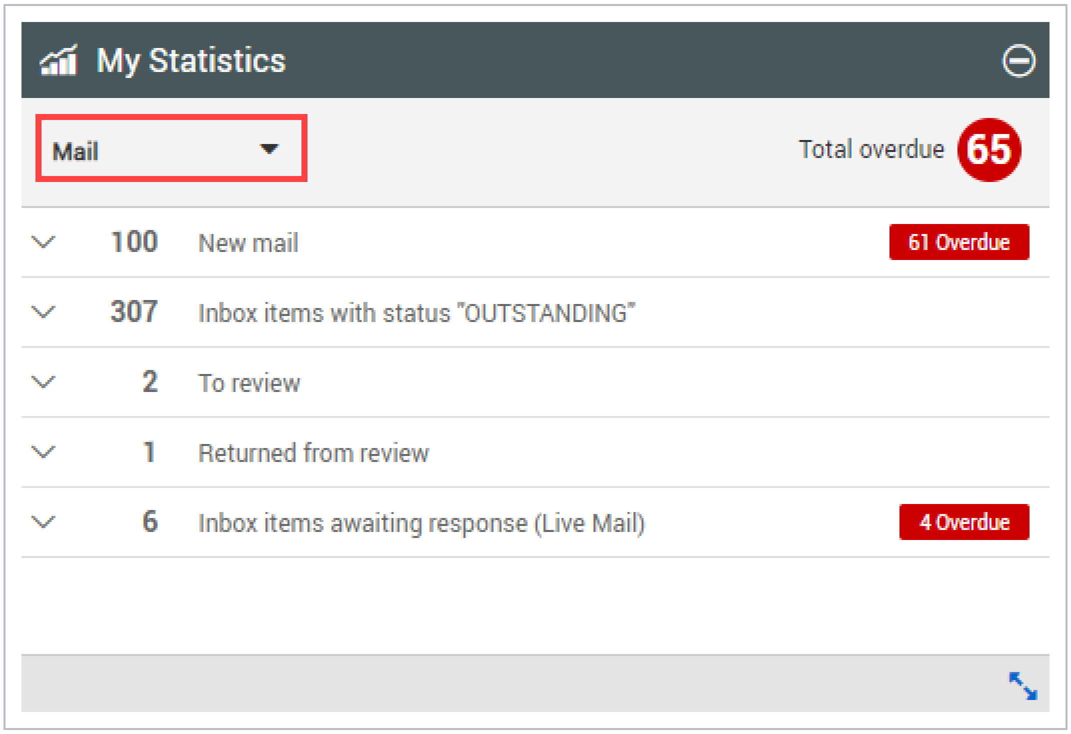


Packages Statistics by Phase	Explanation
Pre-release.	Tender packages created but not released for tender.
Released for tender.	Tender packages currently released for tender.
Closed for bidding.	Tender packages closed for bidding but not yet awarded.
Awarded.	Tender packages awarded but not yet completed.
Completed.	Tender packages completed.

4.2 UNDERSTANDING THE MY STATISTICS TILE WIDGET

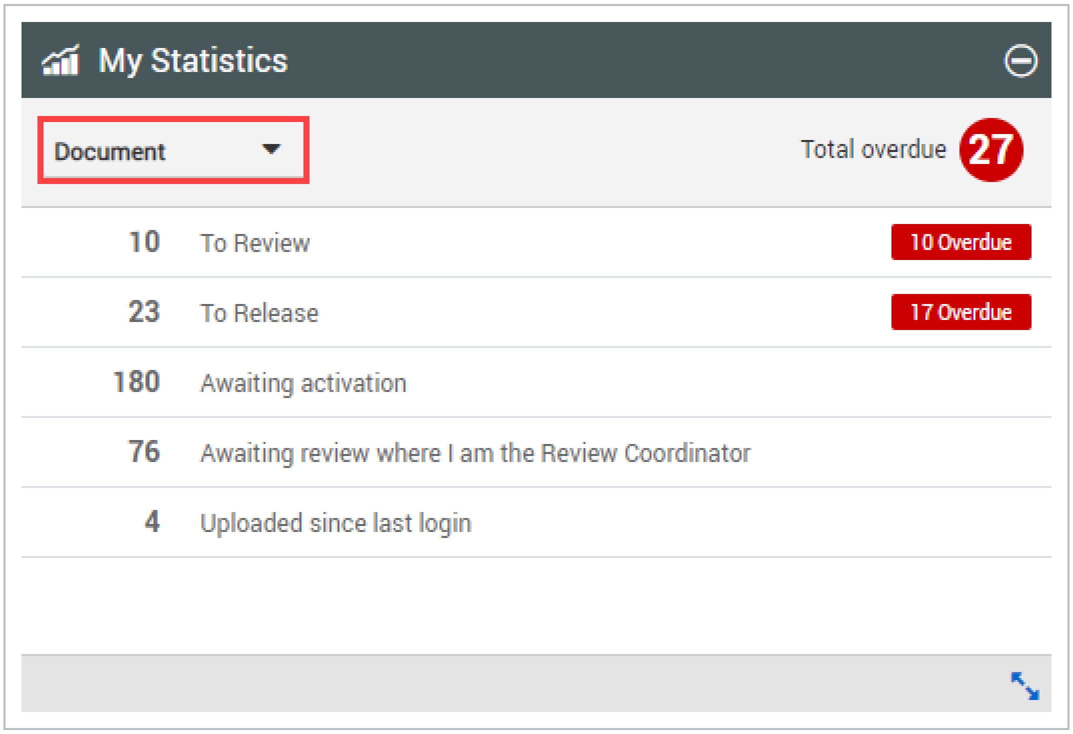
The My Statistics widget tile displays statistics from the Mail, Document and Transmittals modules of InEight Document with links to the module and information. Any items that are overdue for each module will be marked in red on the side. Switch between modules by selecting the drop-down menu.

4.2.1 Mail statistics



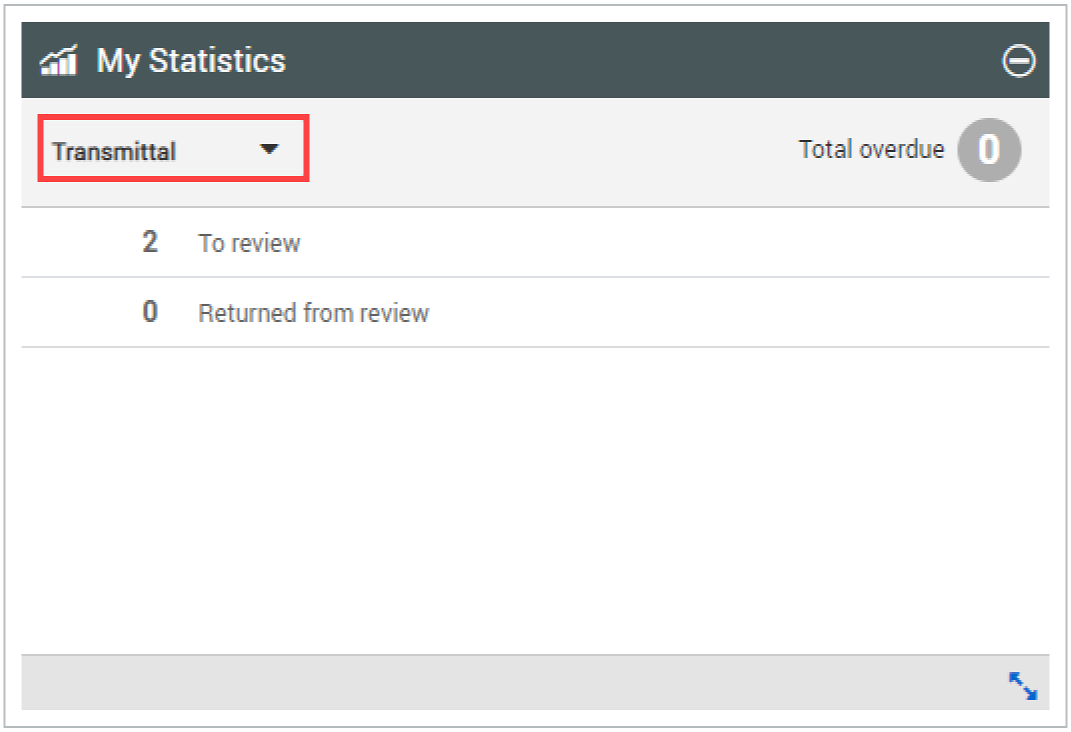
My Statistics - Mail	Explanation
New mail.	Mail items received but not read yet.
Inbox items with status “OUTSTANDING”.	Mail items received that currently have a status of outstanding.
To review.	Mail items prepared by others and submitted for your review.
Returned from review.	Mail items submitted for review that have been reviewed and are ready to be sent.
Inbox items awaiting response (Live Mail).	Received mail items which have not yet been responded to.

4.2.2 Document statistics



My Statistics – Document	Explanation
To Review.	Documents where the workflow has been activated and a review is now required.
To Release.	Documents where the review is complete, but the documents are pending release.
Awaiting activation.	Documents uploaded that require workflow activation.
Awaiting review where I am the Review Coordinator.	Documents under review where you are a review coordinator.
Uploaded since last login.	Documents you have access to that have been uploaded since you last logged in.

4.2.3 Transmittal statistics



My Statistics - Transmittal	Explanation
To Review.	Transmittals that need to be reviewed.
Returned from review.	Transmittals that have been returned from review.

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CHAPTER 5 – MANAGING USER PREFERENCES

Manage your user preferences for your project by accessing the user preferences menu.

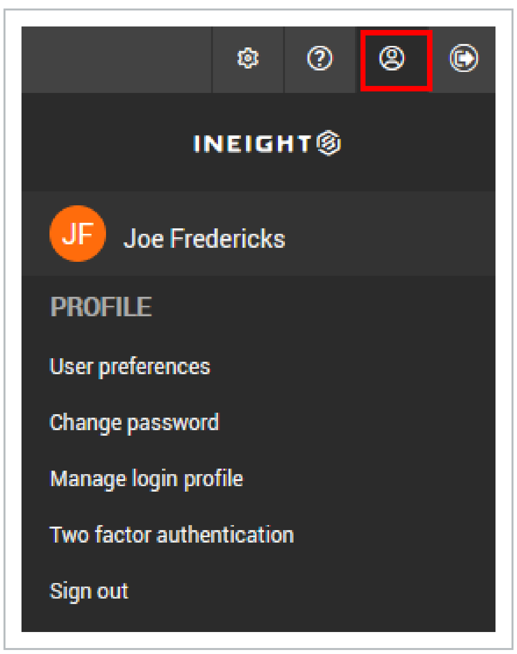
For information on managing user preferences, see the links below.

5.1 APPLYING USER PREFERENCES

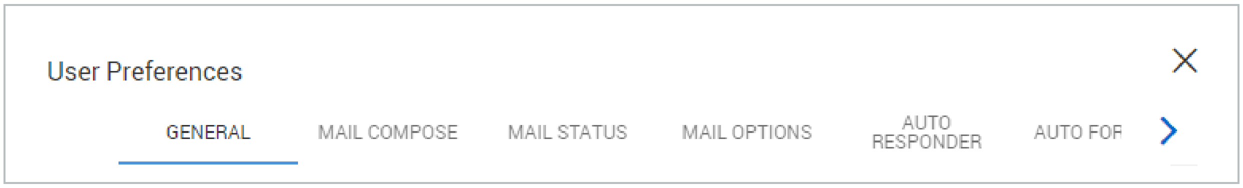
Apply user preferences to your project, which include general, mail and notification settings.

5.1.1 To apply user preferences:

1. Click the **profile icon** and select **User preferences**.

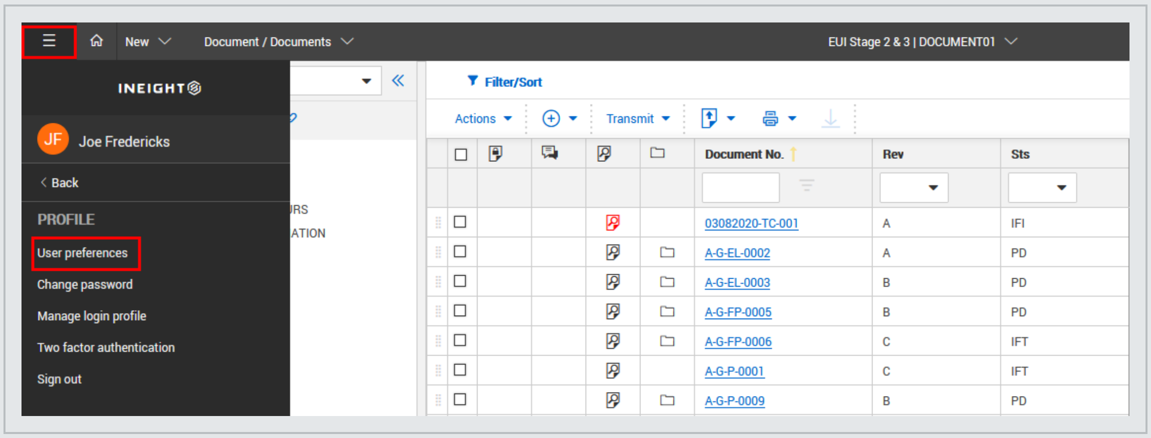


2. Click on the tabs to select a group of settings.



3. Change the desired setting.
4. Click **Save**.

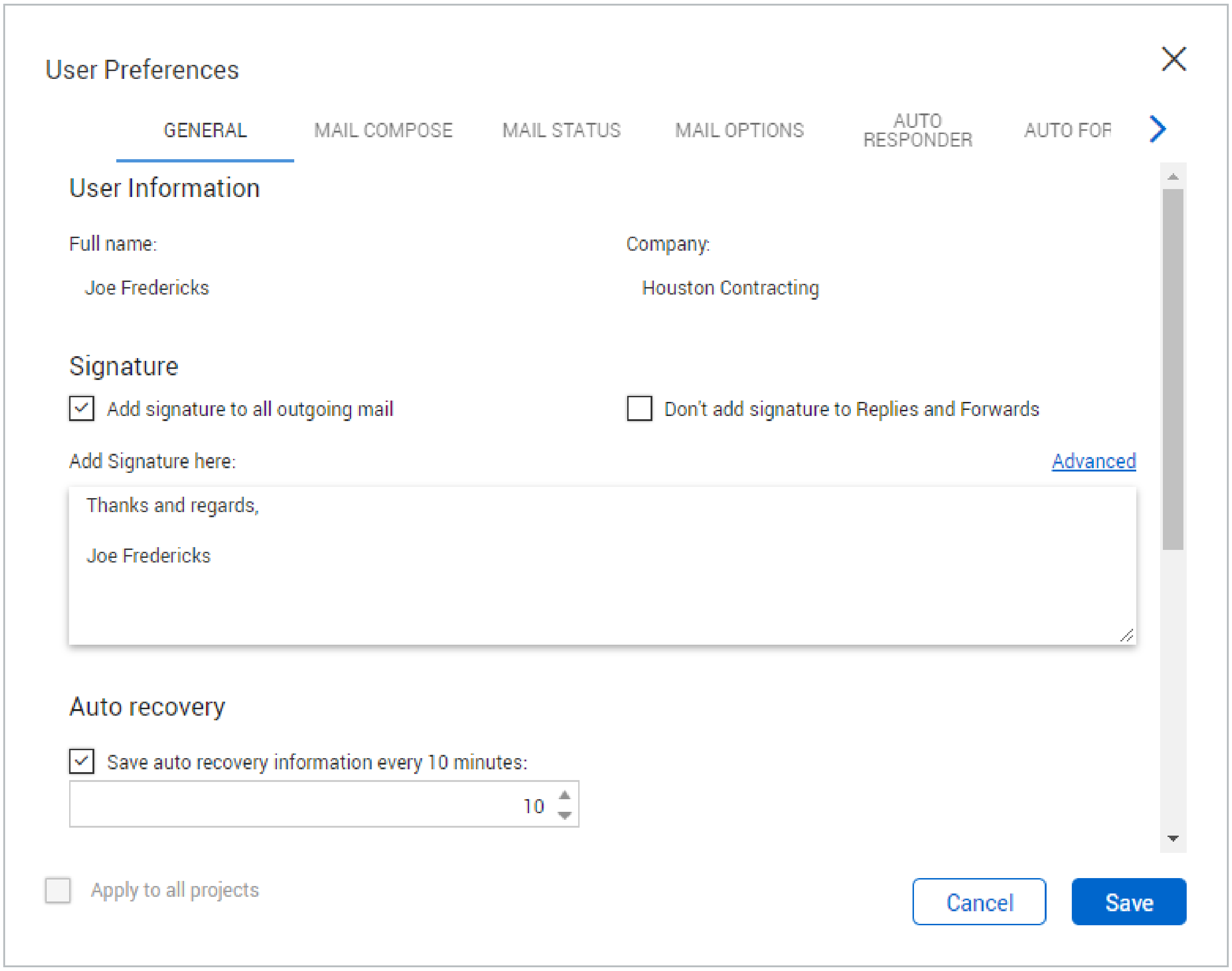
NOTE You can also access **User Preferences** from the main menu:



5.2 UNDERSTANDING USER PREFERENCES

See the tables below for a list of settings available in each tab.

5.3 GENERAL SETTINGS



5.3.1 Signature

Setting	Explanation
Add signature to all outgoing mail.	Use this option to set up a default signature to be included in your mail.
Don’t add signature to Replies and Forwards.	Use this option to exclude the signature when replying to and forwarding mail.

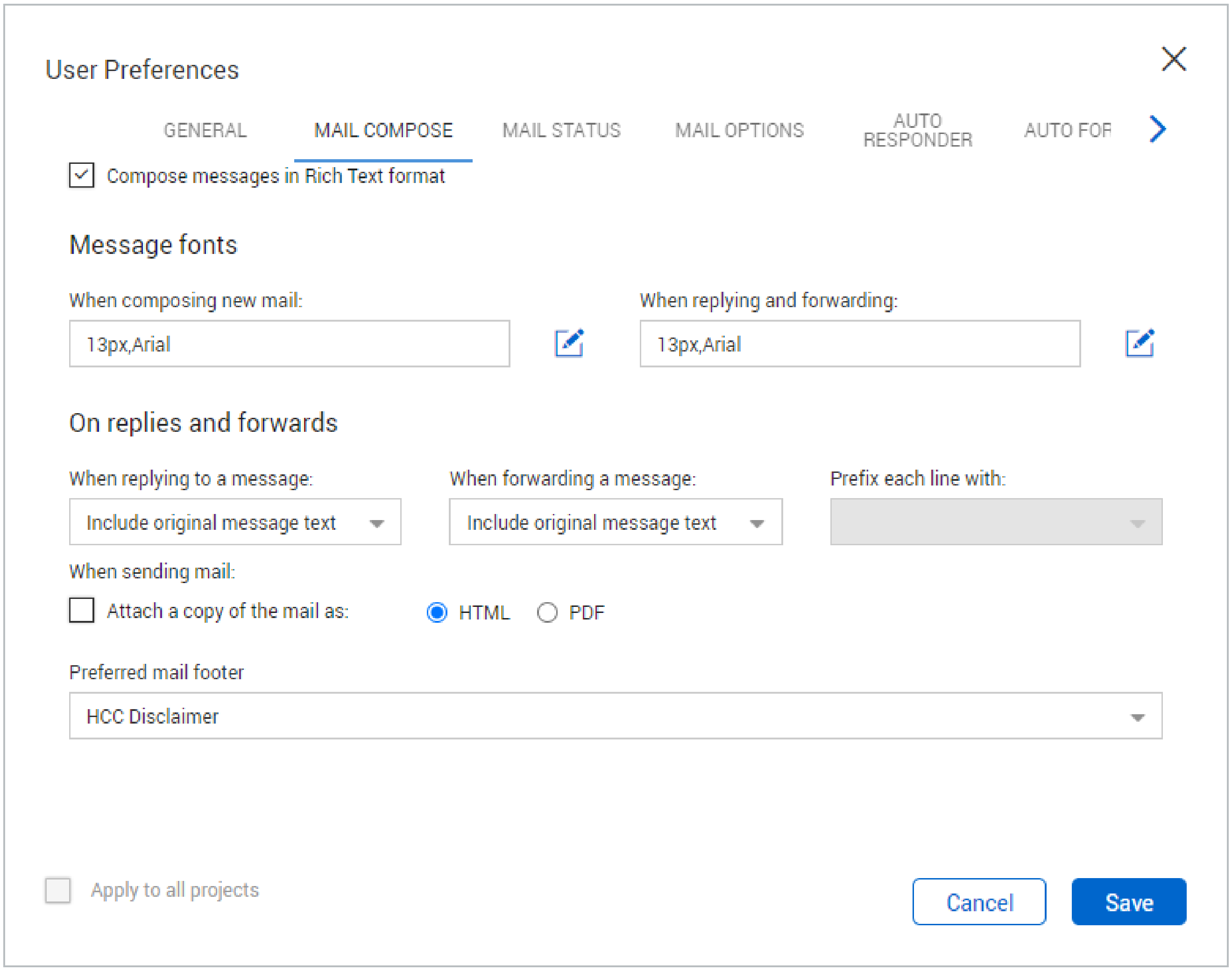
5.3.2 Auto recovery

Setting	Explanation
Save auto recovery information every _ minutes:	Use this option to set how frequently InEight Document saves mail you are composing for auto-recovery purposes.

5.3.3 Additional

Setting	Explanation
Hide duplicate department/company items in Inbox Mail/Transmittal Register.	Use this option to hide duplicate department and company items in the main and transmittal inboxes.
Default markup color.	Use this option to set the color for redlining documents.
Default view:	Use this option to select your most used Register or Dashboard view. This view loads when you log in.
Automatically refresh Dashboard every _ minutes:	Use this option to set how frequently the Dashboard refreshes.
Auto allocate all revisions to folders when adding documents.	Use this option to automatically allocate new revisions to folders when adding documents.
Default date period range for filters:	Use this option to select the default date period range for searches. Select either within last 15 business days or choose a start date.

5.4 MAIL COMPOSE SETTINGS



5.4.1 General

Setting	Explanation
Compose messages in Rich Text format.	Use this option to compose messages in Rich Text format.

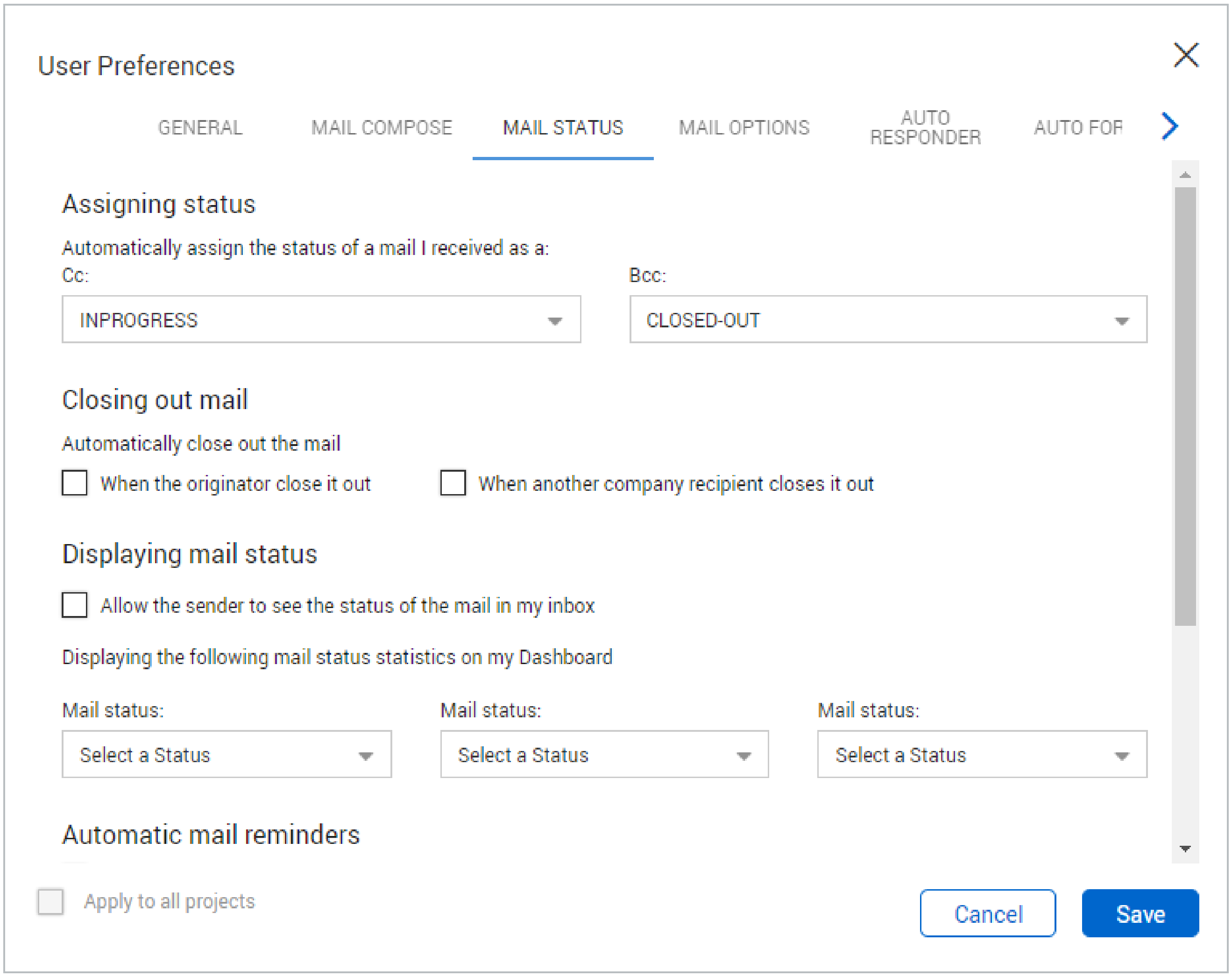
5.4.2 Message fonts

Setting	Explanation
When composing new mail:	Select the font to use when composing new mail.
When replying and forwarding:	Select the font to use when replying to or forwarding mail.

5.4.3 On replies and forwards

Setting	Explanation
When replying to a message:	Use this option to choose whether the original message will be sent with your reply.
When forwarding a message:	Use this option to choose whether the original messages will be sent with your reply.
Prefix each line with:	Use this option to add a prefix to each line.
Attach a copy of the mail as:	Use this option to choose whether to include a PDF or HTML version of the mail when sending.
Preferred mail footer.	Use this option to select your preferred mail footer.

5.5 MAIL STATUS SETTINGS



5.5.1 Assigning status

Setting	Explanation
Automatically assign the status of mail I received as a Cc:	Use this option to automatically assign a status value to incoming mail you receive as a Cc.
Automatically assign the status of mail I received as a Bcc:	Use this option to automatically assign a status value to incoming mail you receive as a Bcc.

5.5.2 Closing out mail

Setting	Explanation
Automatically close out mail: • When the originator closes it out. • When another company recipient closes it out.	Use this option to enable mail to be automatically closed out by either the originator or a company recipient.

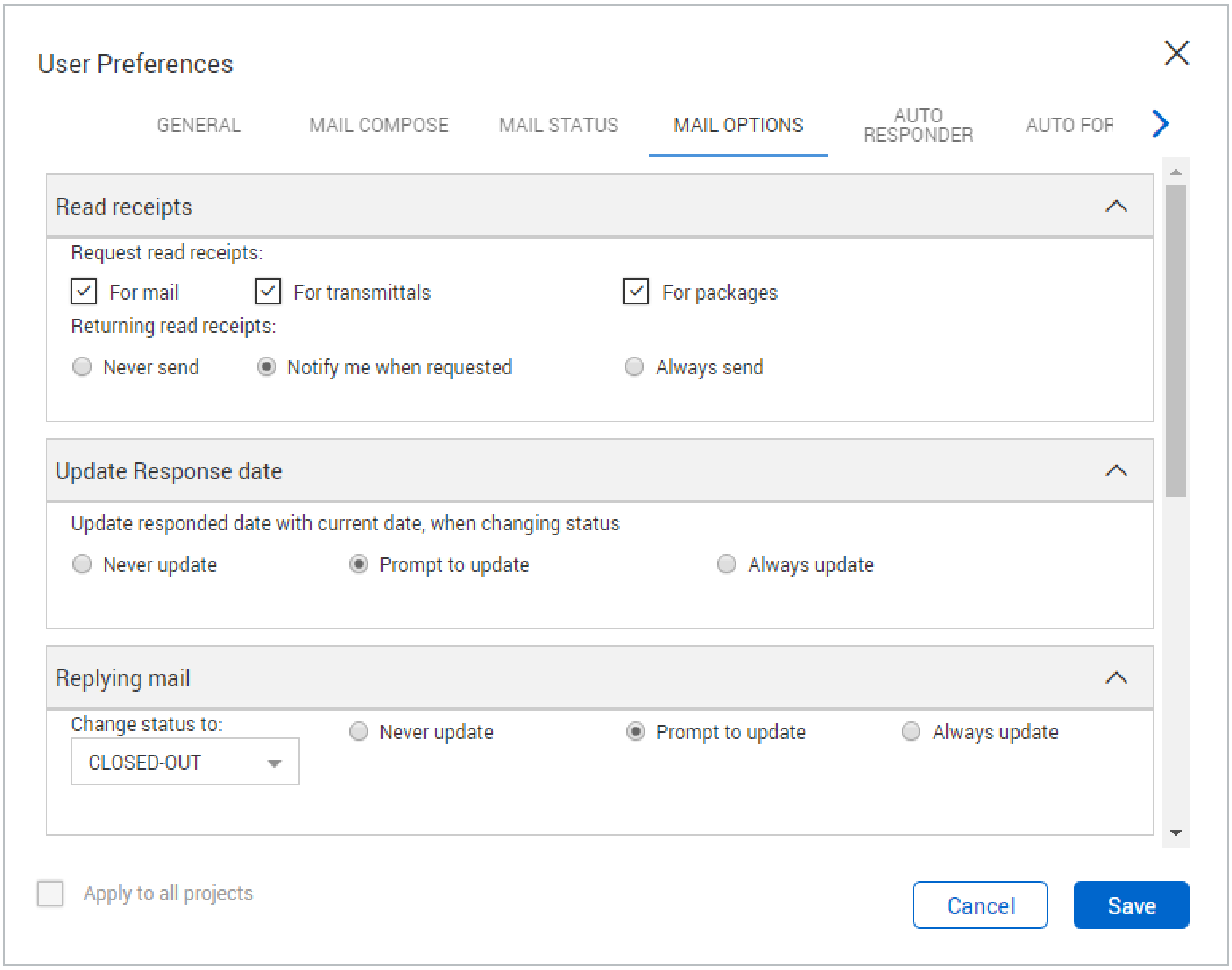
5.5.3 Displaying mail status

Setting	Explanation
Allow the sender to see the status of the mail in my inbox.	Use this option to allow the sender to see the status of the mail in your inbox.
Displaying the following mail status statistics on my Dashboard.	Use this option to select the mail status statistics you want shown on your Dashboard.

5.5.4 Automatic mail reminders

Setting	Explanation
Automatically send me a reminder for mail at the following status:	Use this option to receive a reminder for mail with a specific status, such as In Progress.
Send a reminder every _ business day(s).	Use this option to set how often you want to receive reminders.
Include (regardless of status) mail: a) Which I have not responded to. b) For which the response is overdue.	Use this option to set whether you want to be reminded of all mail or only mail where the response is overdue.

5.6 MAIL OPTIONS SETTINGS



5.6.1 Read receipts

Setting	Explanation
Request read receipts: • For mail. • For transmittals. • For packages.	Use this option to request read receipts for mail, transmittals and packages.
Returning read receipts: • Never send. • Notify me when requested. • Always send.	Use this option to select whether to send read receipts, or to be notified when they have been requested.

5.6.2 Update response date

Setting	Explanation
Update responded date with current date, when changing status: • Never update. • Prompt to update. • Always update.	Use this option to select whether you want the date responded to be updated to the current date.

5.6.3 Replying mail

Setting	Explanation
Change status to: • Never update. • Prompt to update. • Always update.	Use this option to automatically change the status of mail when you reply to it. You can also select whether you want to be prompted for this option.

5.6.4 Hard Copy print options

Setting	Explanation
When sending mail via Hard Copy: • Show preview. • Print immediately.	Use this option to select whether Hard Copy mails are shown as a preview or printed immediately.

5.6.5 Print Mails

Print Mail	Explanation
When sending mail: • Never print. • Prompt to print. • Always print.	Use this option to select whether you want to automatically print sent mail.

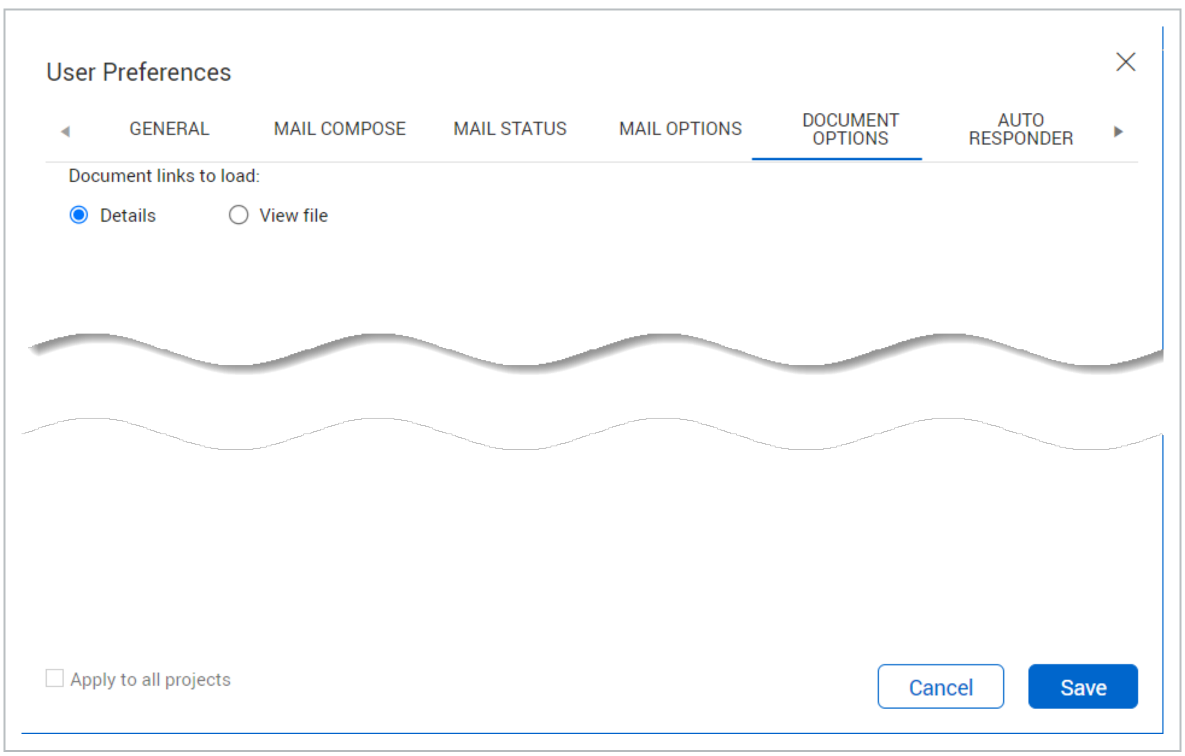
Print Mail	Explanation
Include internal notes: • Never print. • Prompt to print. • Always print.	Use this option to select whether you want to include internal notes when you print mail.

5.6.6 Attaching Mail

Attaching Mail	Explanation
Attach mail as PDF document, when processed as document: • Never attach. • Prompt to attach. • Always attach.	Use this option to automatically attach documents in PDF format.

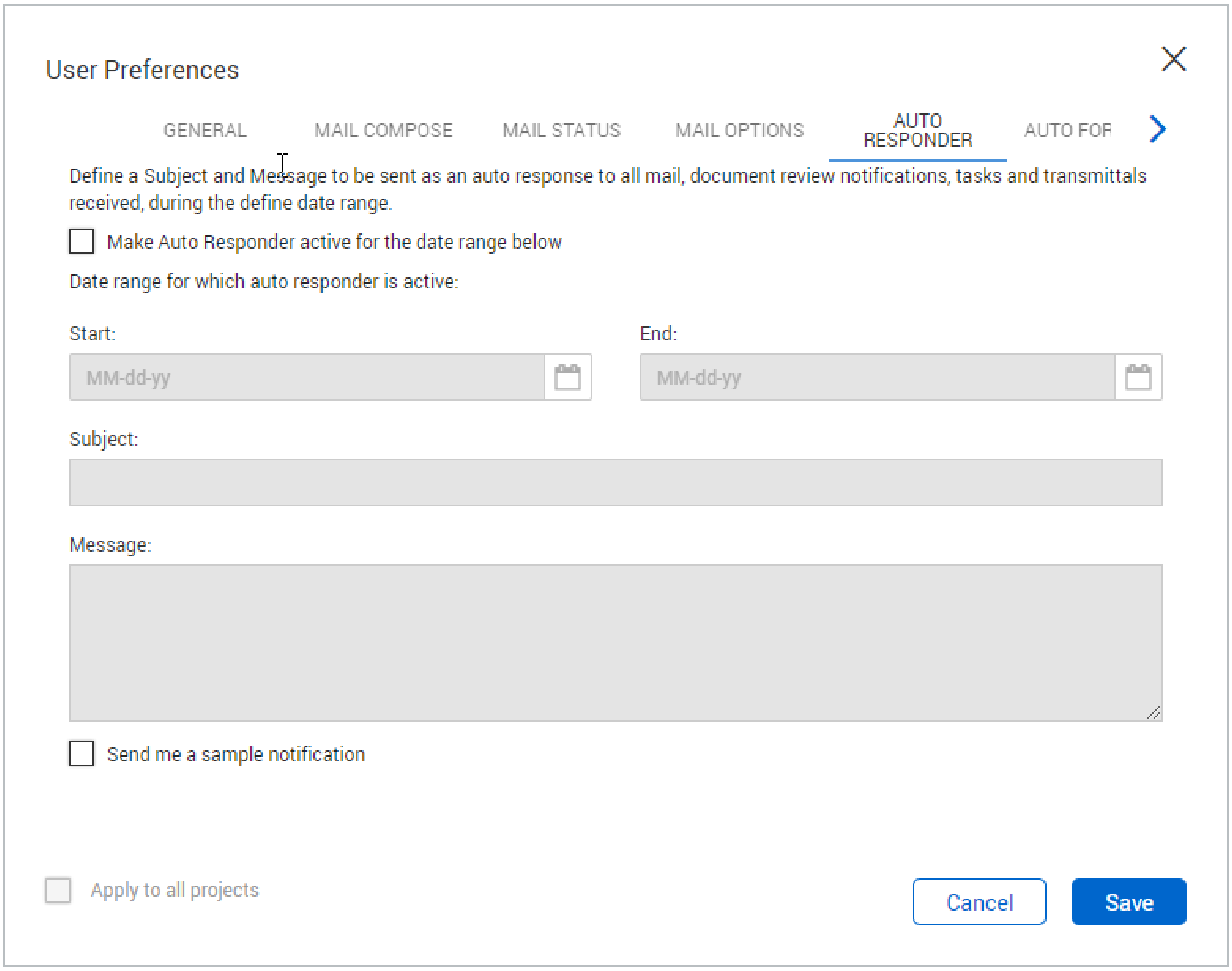
5.7 DOCUMENT OPTIONS SETTINGS

The Document Options settings include options for document links.



Setting	Explanation
Document links to load: • Details • View file	When you click a link to open a document, this setting indicates the document opens to its Details page or in the viewer. When the option is set to Details, you can view information about the document before viewing it. When the option is set to View file, the document opens in the viewer.

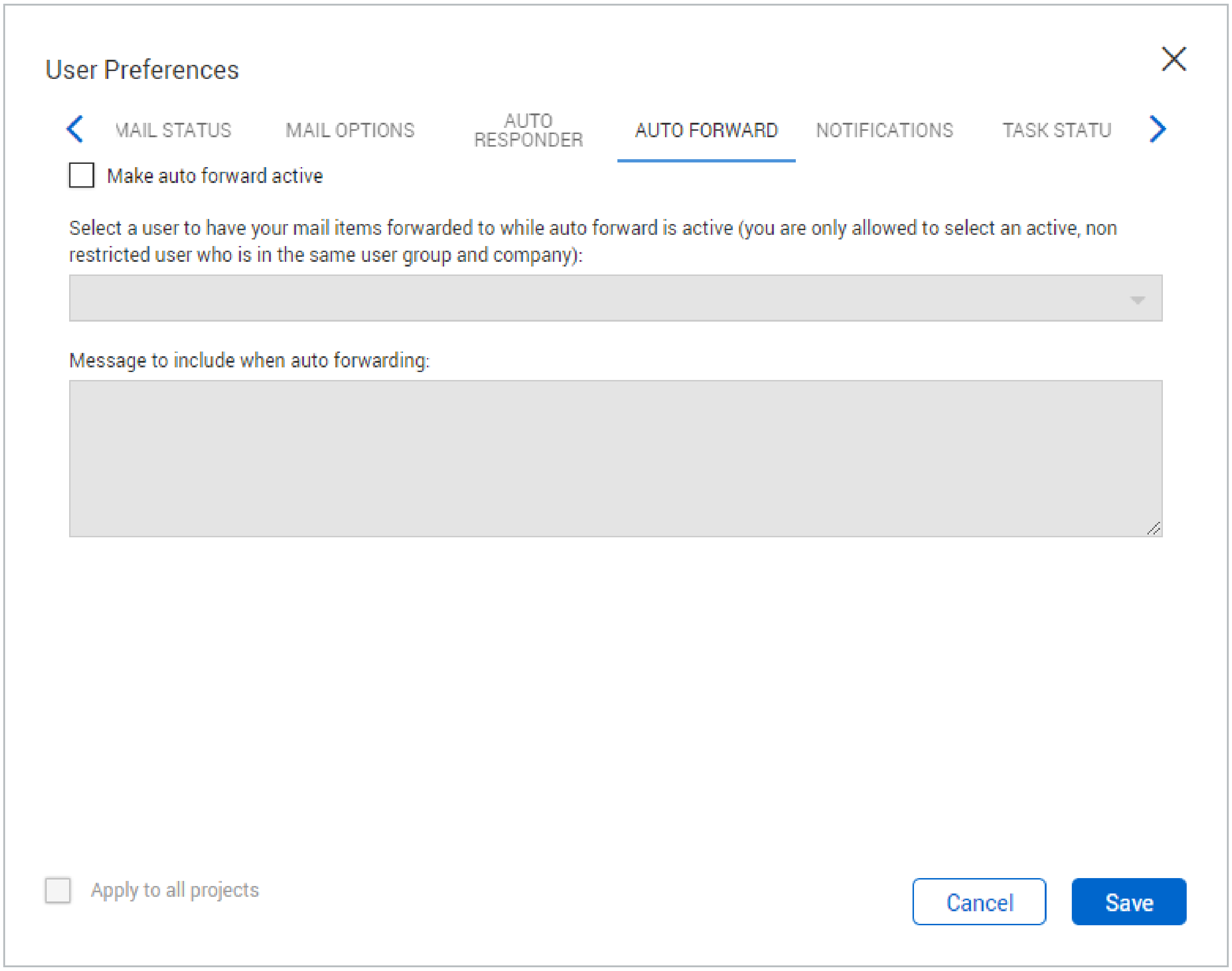
5.8 AUTO RESPONDER SETTINGS



5.8.1 General

Setting	Explanation
Make Auto Responder active for the date range below.	Use this option to enable an automatic response for incoming mail.
Start: End:	Select the start and end dates for the autoresponder.
Subject:	Enter the subject of the autoresponder.
Message.	Enter the message of the autoresponder.
Send me a sample notification.	Use this option to send a sample notification to your email.

5.9 AUTO FORWARD SETTINGS

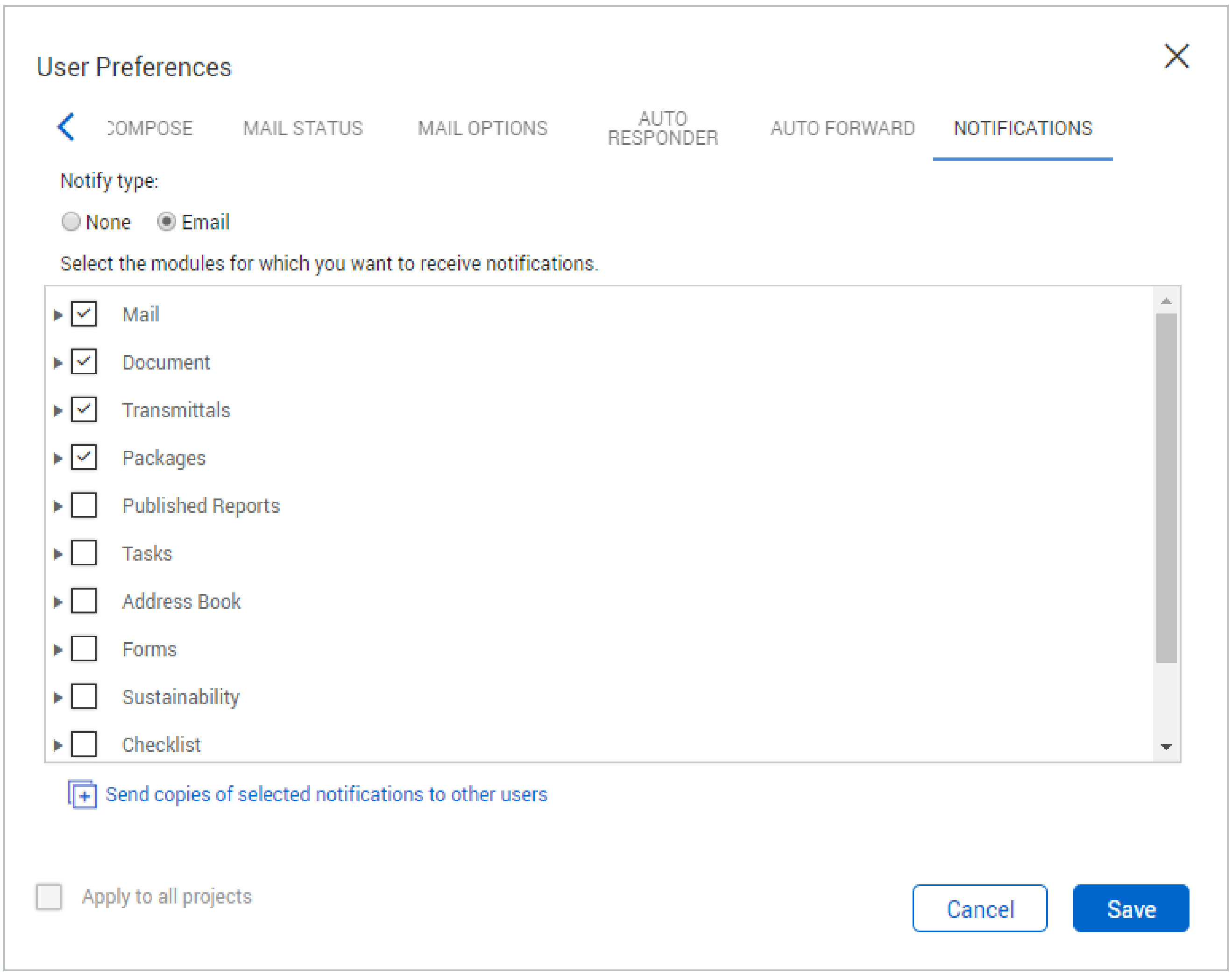


5.9.1 General

Setting	Explanation
Make Auto forward active.	Use this option to automatically forward any correspondence you receive to a designated person with a standard covering note.
Select a user to have your mail items forwarded to while Auto	Use this option to select a user to receive the correspondence.

Setting	Explanation
forward is active (You are only allowed to select an Active, Non restricted user who is in the same user group and company).	
Message to include when auto forwarding.	Enter the message to include when auto forwarding correspondence.

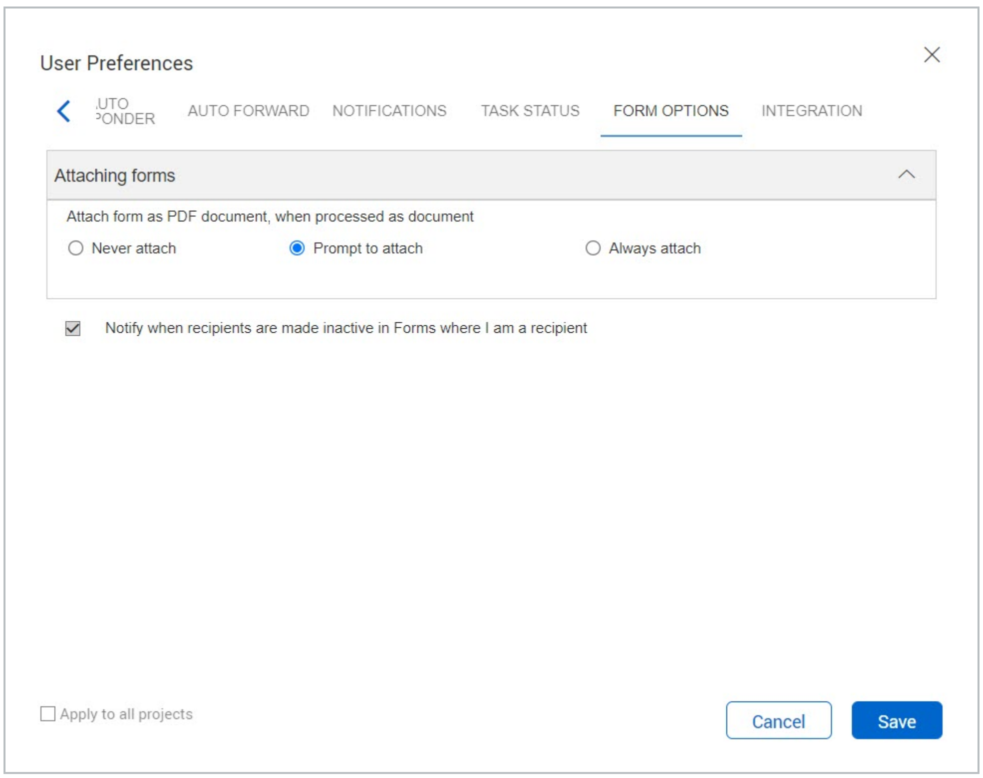
5.10 NOTIFICATIONS SETTINGS



5.10.1 Notify type

Setting	Explanation
• None. • Email.	Use this option to select whether you want to receive notification by email for selected modules.
Select the modules for which you want to receive notifications.	Select the check boxes of modules you want to receive email notifications for.
Send copies of selected notifications to other users.	Use this option to select whether a copy of notifications is to be received by another user.

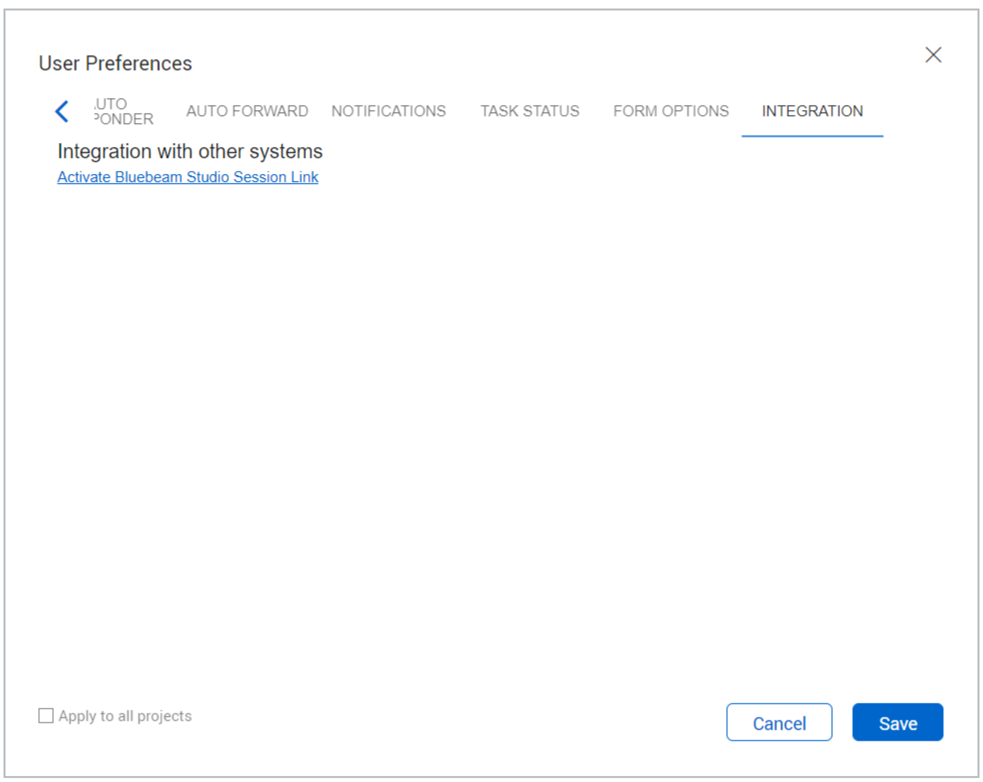
5.11 FORM OPTIONS SETTINGS



5.11.1 Attaching forms

Setting	Explanation
Attach form as PDF document, when processed as document	Use this option to indicate whether to attach a form as a PDF document. • Never attach indicates that a form is never attached as a PDF. • Prompt to attach indicates that you are prompted each time a form is processed as a document, and you can choose whether to attach it as a PDF. • Always attach indicates that a form is always attached as a PDF.
Notify when recipients are made inactive in forms where I am a recipient	Deselect this check box when you do not want to receive a notification when a user is made inactive on forms where you are also a recipient.

5.12 INTEGRATION SETTINGS



5.12.1 Integration with other systems

Setting	Explanation
Activate Bluebeam Studio Session Link	Use this option to link to the Bluebeam Gateway and sign into Bluebeam. After you are signed in, the link changes to *Bluebeam studio is linked to* and shows your email address. A Remove link option is also added. Click Remove link to unlink your email address.

CHAPTER 6 – TASKS

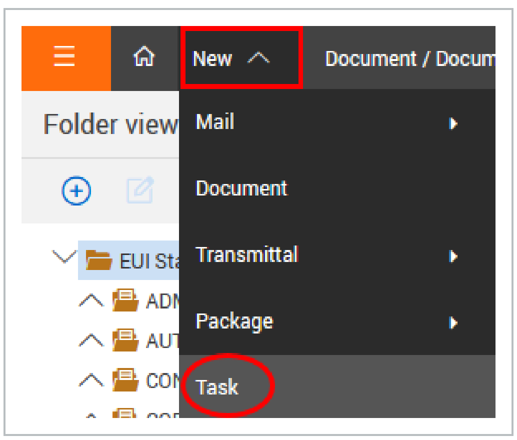
CHAPTER 6 – CREATING TASKS

The Tasks feature enables users to assign and manage project related tasks within InEight Document.

6.0.1 Creating Tasks from the New Menu

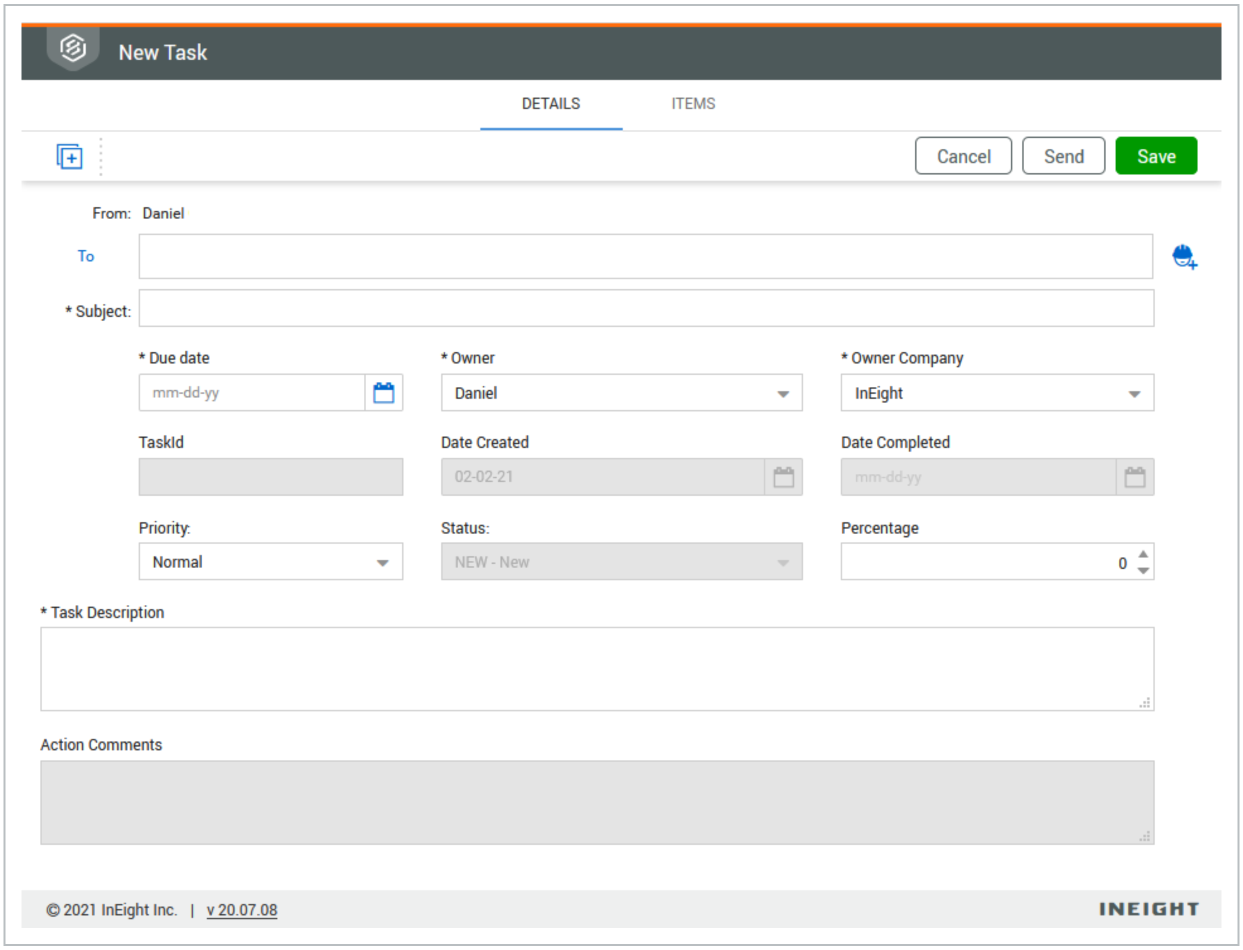
To create a task:

1. Go to **New** then **Task**.

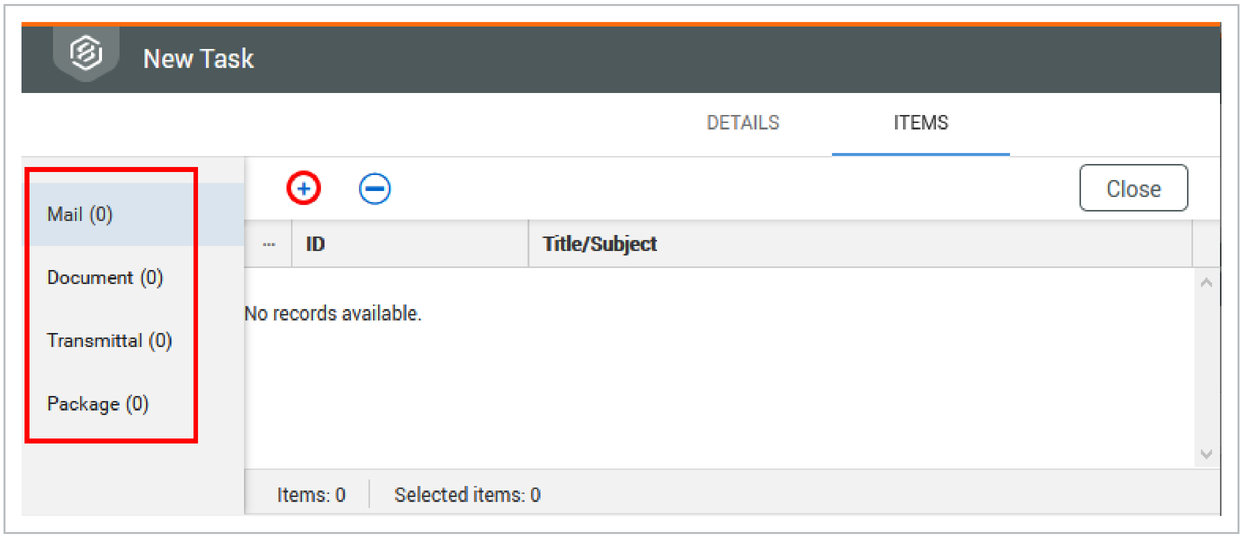


2. At the New Task screen, select or enter the following:
   - **To:** Enter the name of the person (s) the task is being assign to.
   - Select the **Owner** of the Task (Company and Contact)
   - Select **the Due Date** for the Task.
   - Enter a **Subject** for the Task.

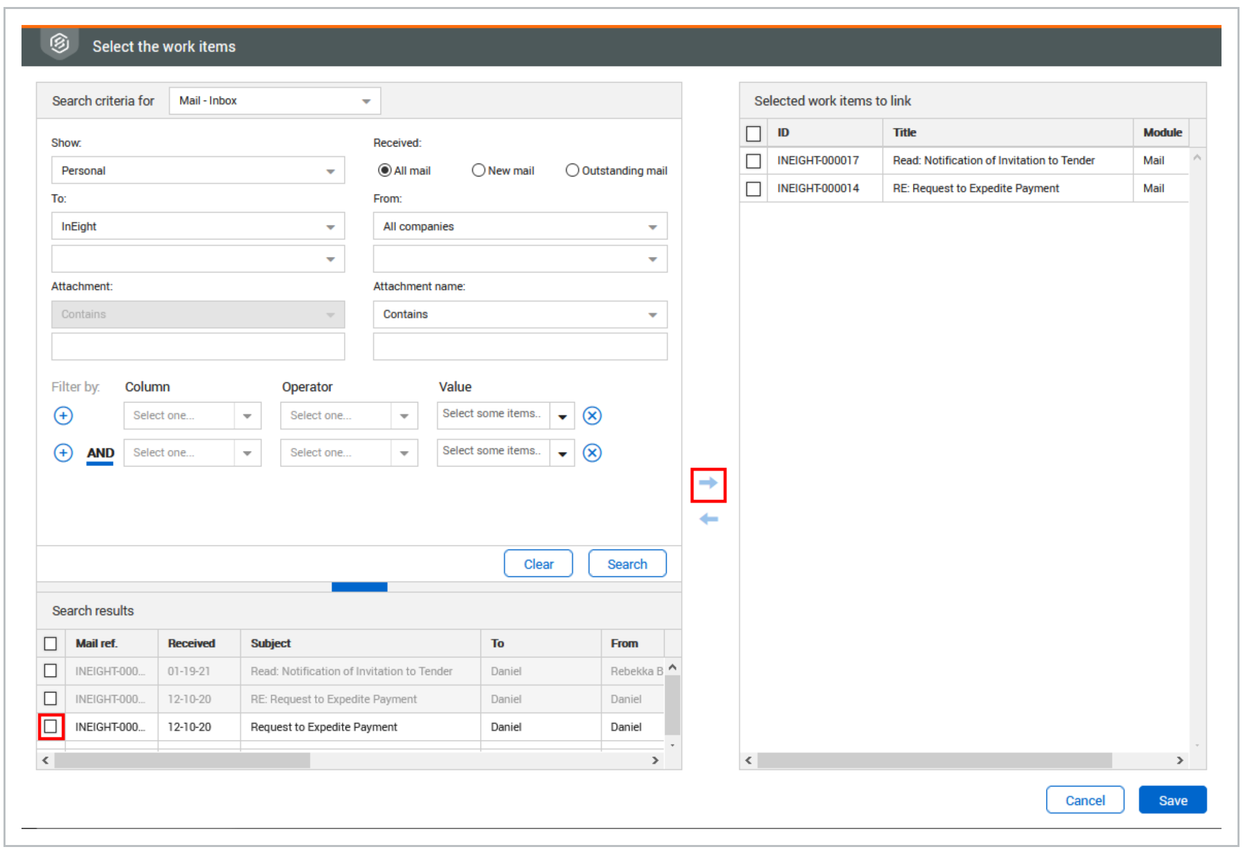
- Enter the **Description** of the Task.



5. Go to the **Items** tab to link or associate the tasks with one or more work items from the various InEight Document modules (Mail, Document, Transmittals or Packages).

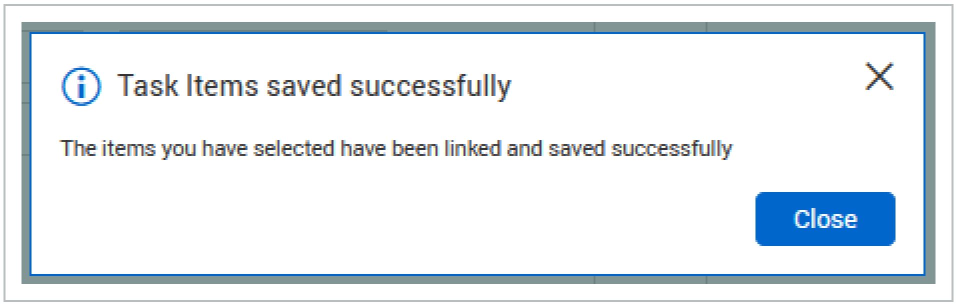


6. Select the module you want to link items to, then click icon.
7. The standard search window for each module appears, set the required search criteria and click **Search**.



8. Select the relevant work items and click to add them.

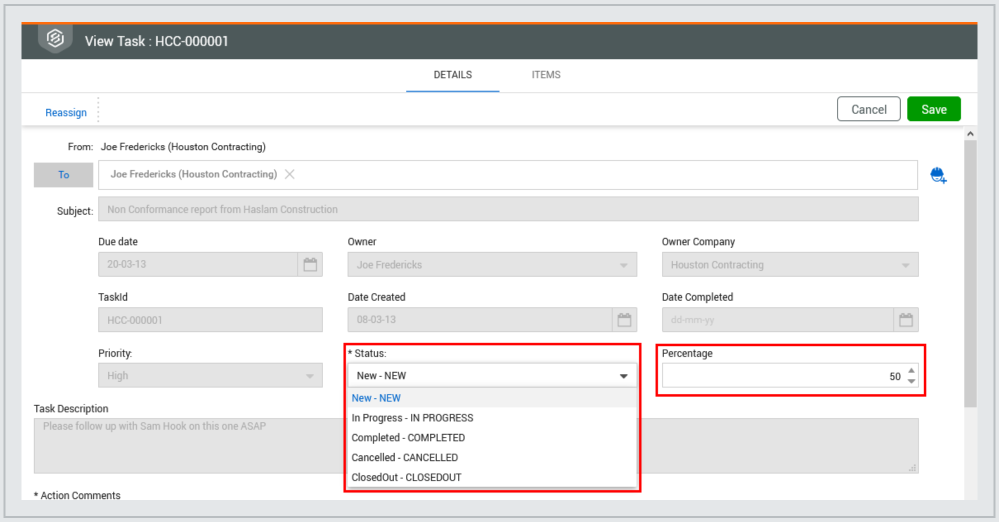
6. Click **Save** to complete linking the items.



7. An email notification will be sent to the user(s) allocated the task and will also appear in their Tasks Inbox.

NOTE

- The **From** value is always the person logged in creating the Task.
- The Status of all newly created Tasks is set to “**New**” automatically by the system and sent tasks are stored in the Tasks Sent register.
- If a Task is assigned to more than one person:
  - Each recipient can manage their own Action Status and Percentage complete against the Task.



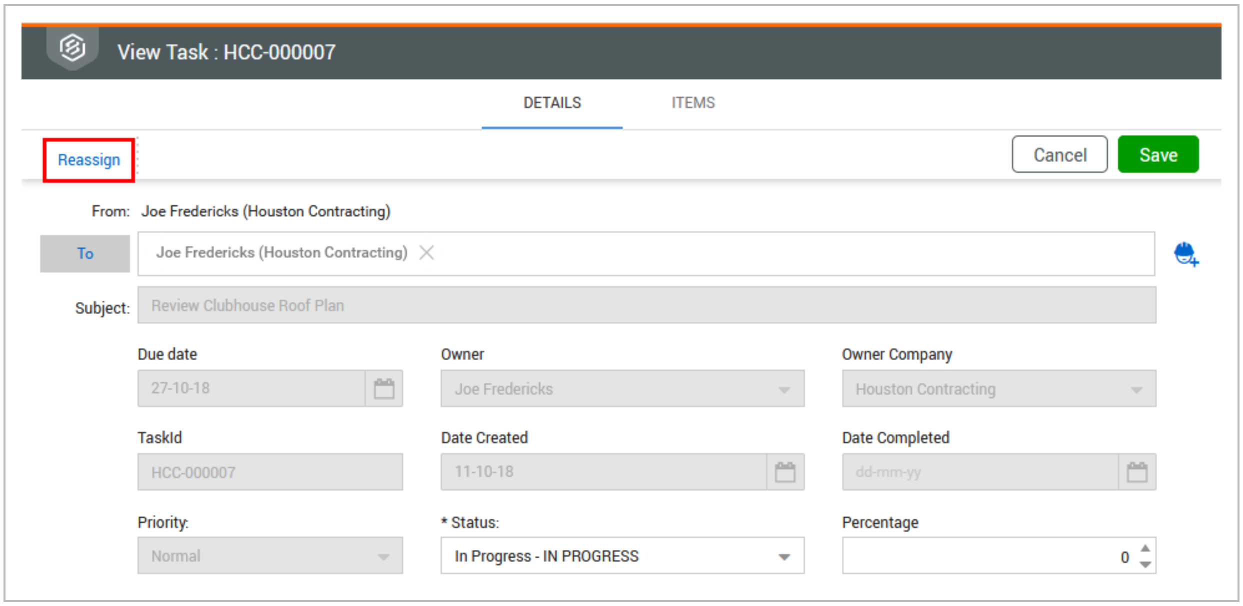
  - As soon as the first recipient changes the Action Status from “New” to something else, the overall Task Status will change to “In Progress”.
  - Once a Task recipient updates their Task Status to “Completed” the task Owner is notified.
  - Once all recipients have updated their Task Status to “Completed” the overall status of the task will change to completed.

CHAPTER 6 – MANAGING TASKS

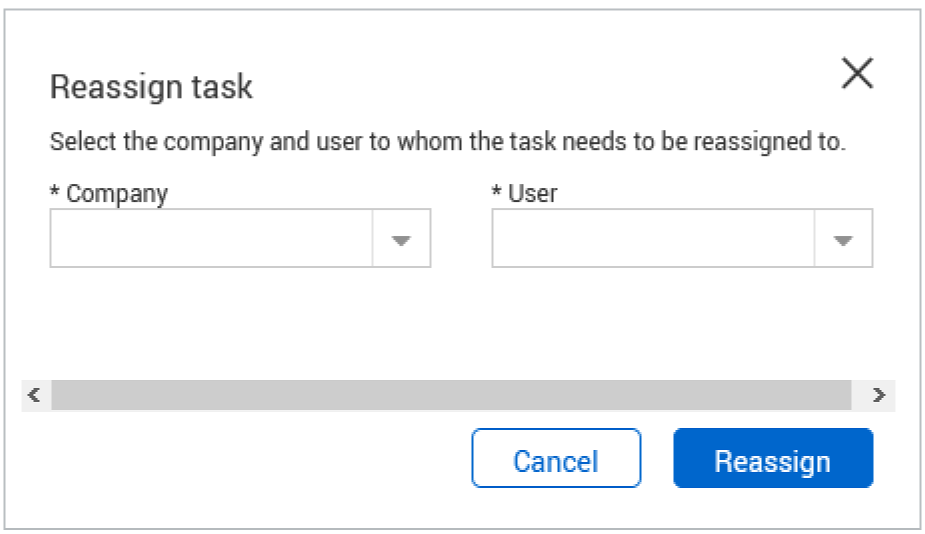
The following actions relate to managing tasks that are in progress:

6.0.1 Re-Assign a Task

1. From within the Task details window, click **Reassign**.



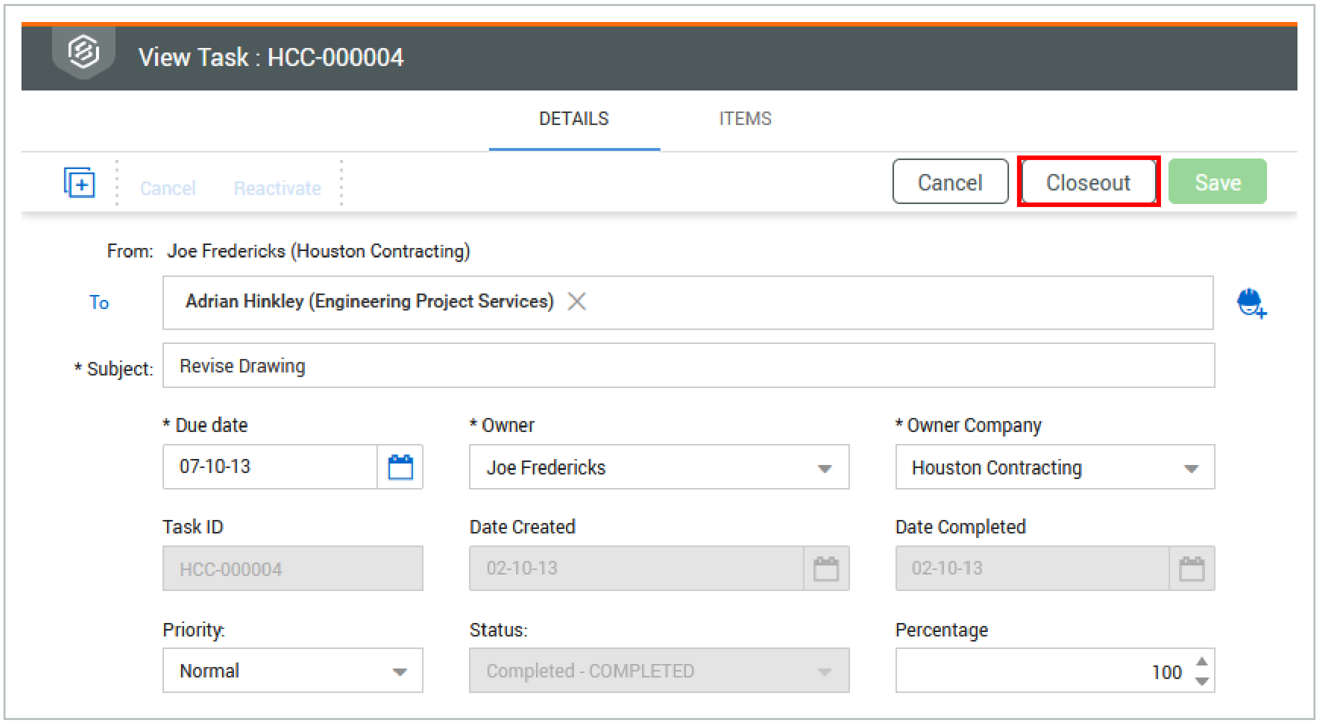
2. Choose the Company and Contact to reassign the task to and click **OK**



3. A task notifications will be sent to both the person the task has been reassigned to and the Task Owner.

6.0.2 Close Out a Task

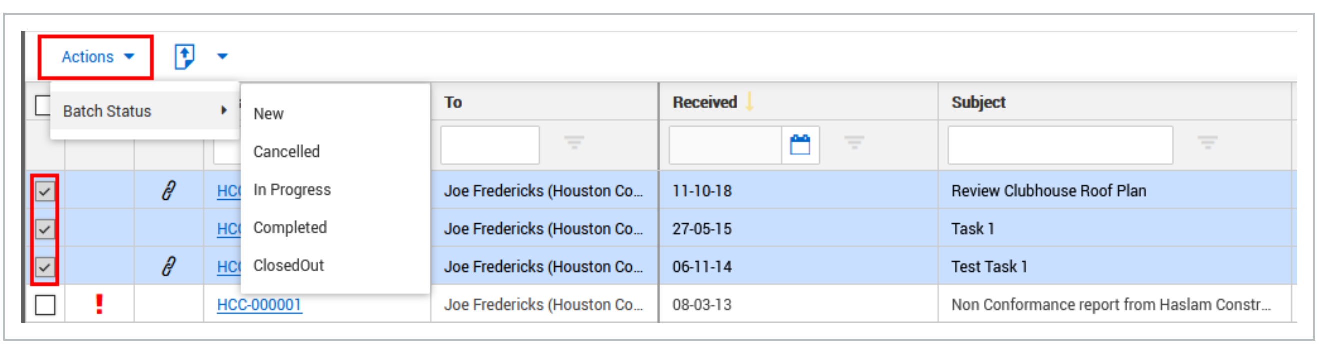
Tasks for which all recipients have changed the action status to completed can either be Closed out by the Owner or if not competed as required, reopened by changing the status to an open status in which case the To recipients will be notified. Closing out a Task is done via the **Closeout** button from within the Task details window.



NOTE	The closeout button is only accessible when the task status is set to completed.

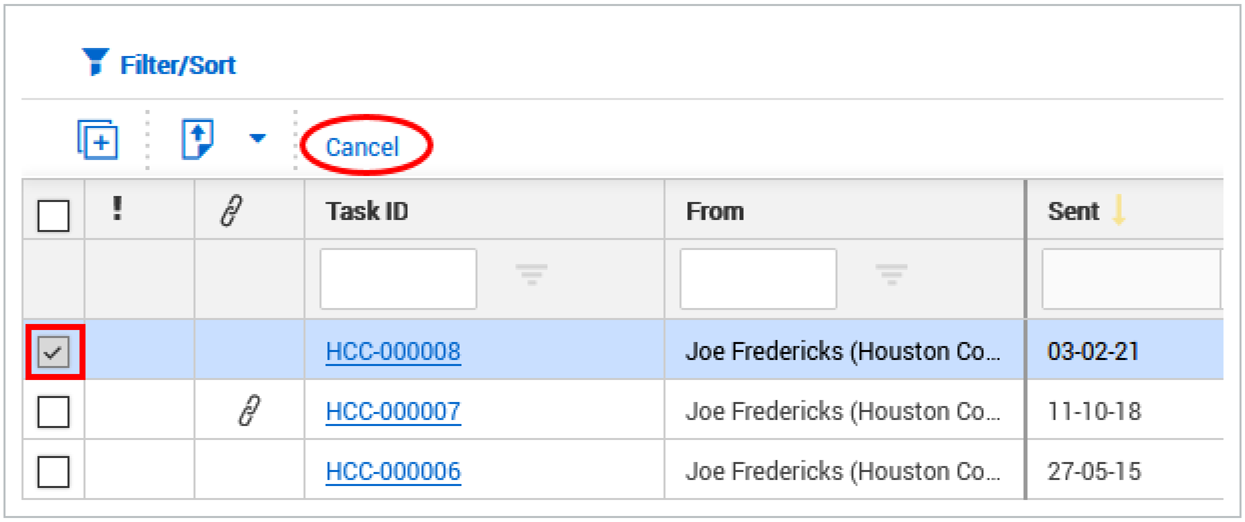
6.0.3 Update task status in bulk

To update the batch status in bulk, select the Tasks then click **Actions**, select **Batch Status** and choose the relevant option.



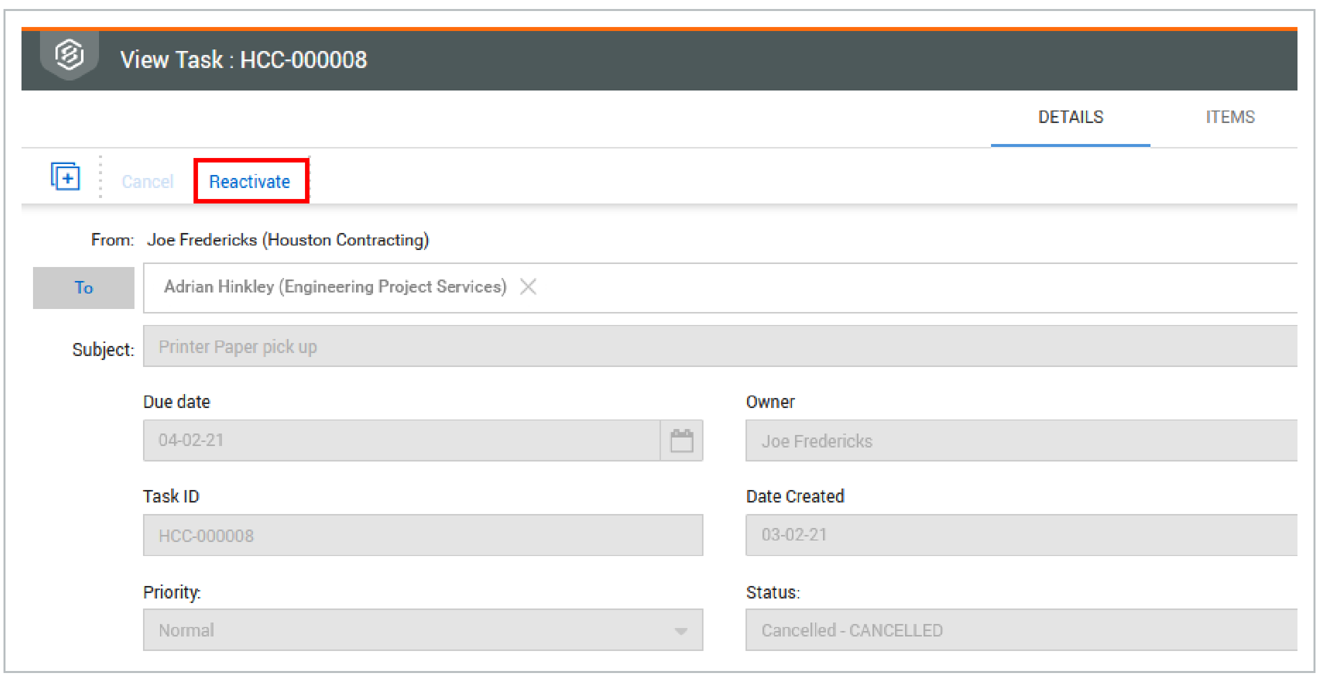
6.0.4 Cancelling a Task

Tasks can be cancelled by either the Task Owner or the From user (the task sender). This is done via the cancel buttons. The user is required to enter a reason for the Cancellation and notifications are sent out to the affected users.



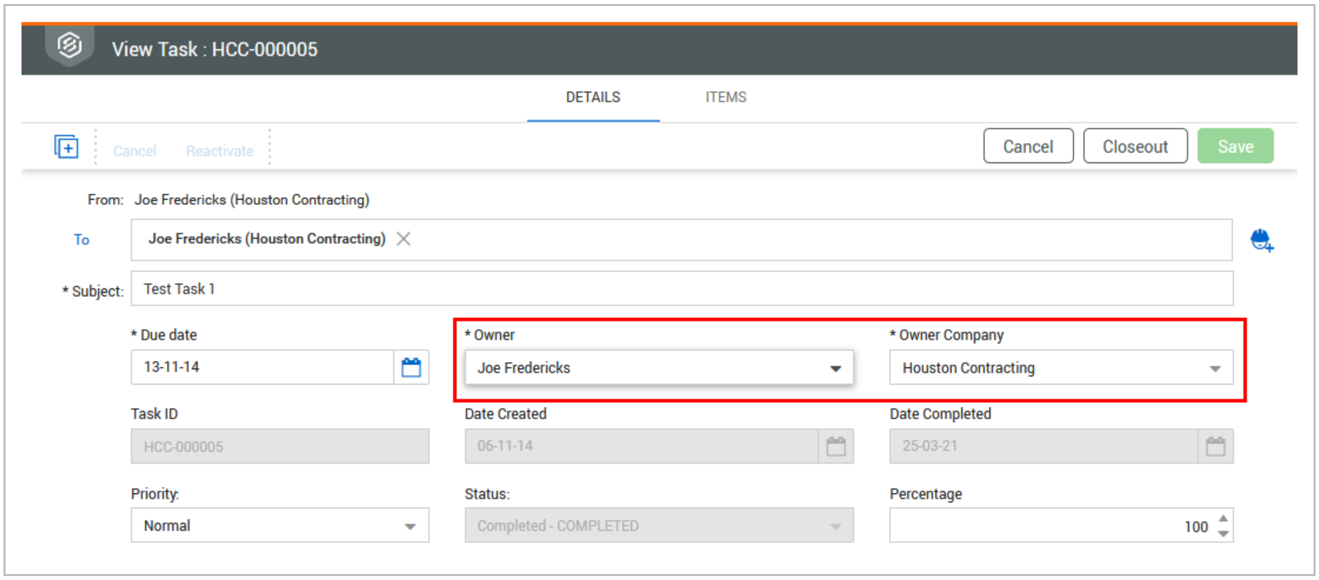
6.0.5 Reactivating a Task

Task that was previously Cancelled out can be Re-activate again via the **Reactivate** button.



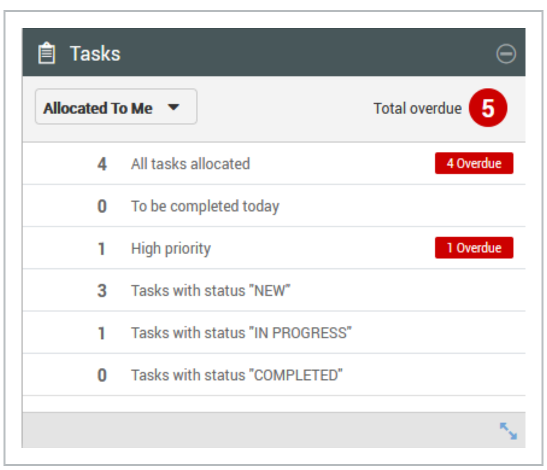
6.0.6 Change the Task Owner

A Task Owner can change the ownership to another user in their company. Primary/Additional/Company Administrators can change the ownership of Tasks belonging to their company.

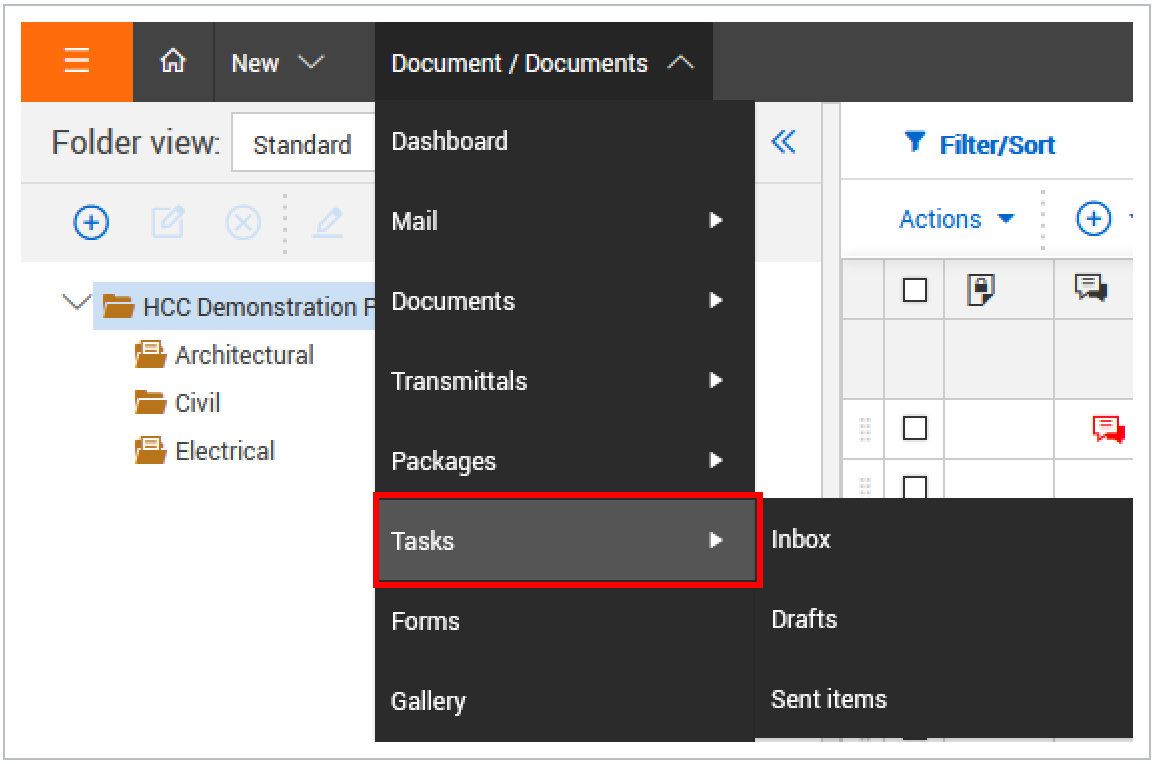


CHAPTER 6 – TASK NAVIGATION

Tasks can be located from the Tasks Dashboard Widget by clicking any of the links displayed to view the details. There is the option to view either Incoming or Outgoing tasks.



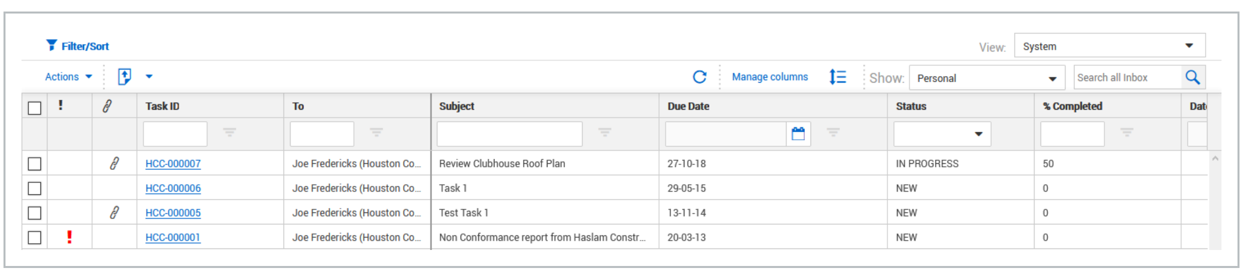
The Task Registers can be found by clicking **Tasks** and then selecting the required register (Inbox, Drafts, Sent Items).



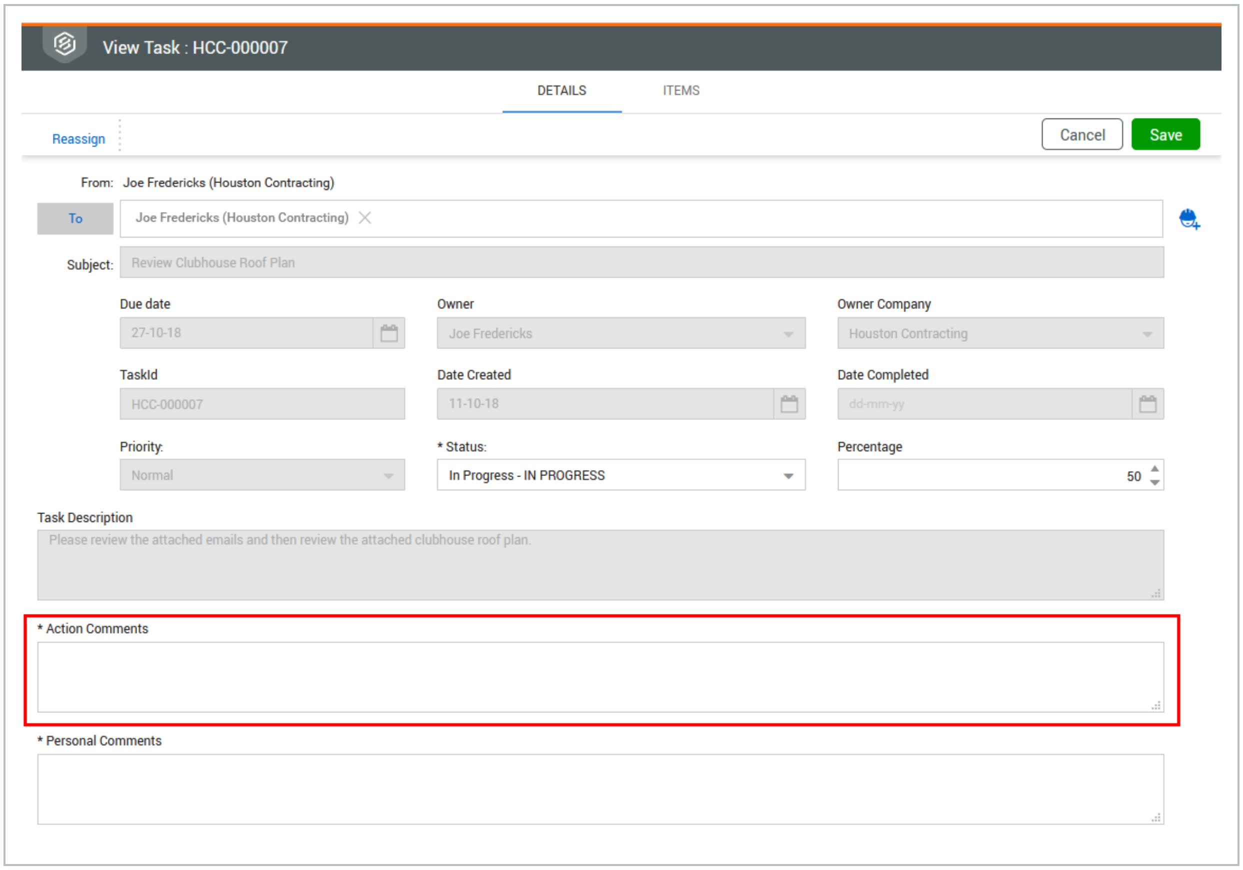
6.0.1 Inbox (Updating Tasks)

The Tasks Inbox displays a list of all tasks assigned to you.

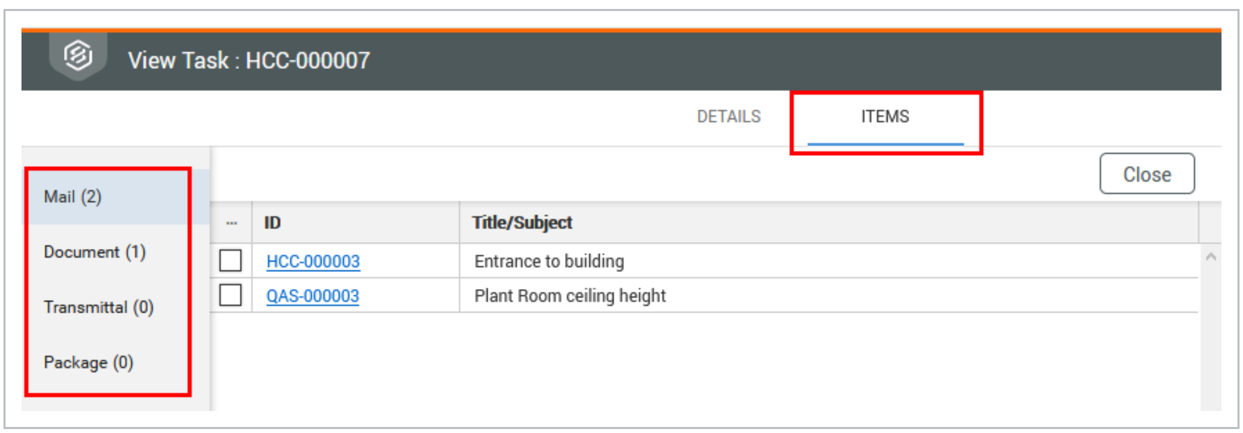
1. Double click to open a Task.



2. Record your actions in the **Action Notes** field. Update the **Percentage completed** and **Status**.



3. Any files linked to a task can be opened by clicking on them within the TaskItems tab.



6.0.2 Drafts

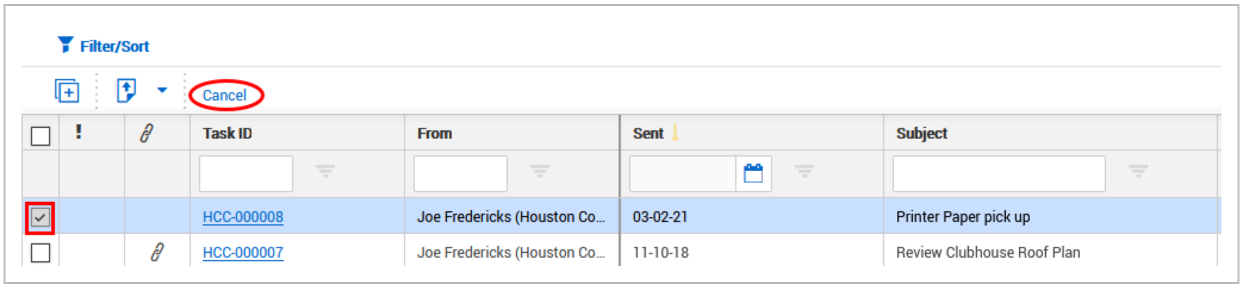
The Drafts register displays tasks that have been created and saved but not sent.

To send a task from the Drafts register, open the task, edit if required then click **Send**.

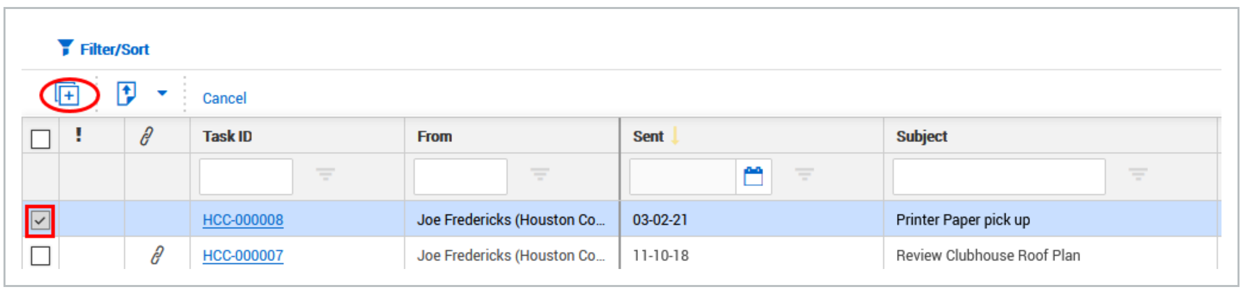
6.0.3 Sent Tasks Register

The Sent Items register of Tasks displays all tasks that you have assigned to other users.

1. Cancel a task(s) by selecting the task(s), then click**Cancel** . At the warning message confirming the cancelling of the task(s) choose **Yes**. Enter a reason for the cancellation, if you have more than one task to cancel you can select to “apply same reason to selected tasks”.



2. Use the **Duplicate** button to create a new task based on the selected task.



NOTE The Tasks register (Inbox, Drafts and Sent Items) can be exported to MS Excel using the **Export** button, selecting **Excel** and choosing between **All Items** and **Selected Items**. The export process will export all or selected records for the currently applied filter with the same columns as currently displayed in the register.